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ABSTRACT

The handbooks in the Office of Education State Educational Records and Reports series have been designed to facilitate the collection and maintenance of data for decisionmaking at the local level and the reporting of educational information to others. Described first in this publication is a program structure for a local education agency which combines with the information in the handbook series to form the basis for development of the program aspects of an educational information system. The author then considers some of the general factors involved in organizing and using a staff information subsystem, and provides a list of data elements about staff members, organized into a detailed classification structure. Definitions for these data elements are provided in a subsequent section. The closing chapter defines some useful staff measures and suggests examples of ratios, rates, and quantitative units. (Author)

74-314

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Classifications and Standard Terminology for Local and State School Systems 1974

by
Charles T. Roberts
National Center for
Educational Statistics
Office of Education

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Caspar W. Weinberger, *Secretary*
Charles B. Saunders, Jr., *Acting Assistant Secretary for Education*

Office of Education
John Ottina, *Commissioner*

"The purpose and duties of the Office of Education shall be to collect statistics and facts showing the condition and progress of education in the United States, and to disseminate such information respecting the organization and management of schools and school systems, and methods of teaching, as shall aid the people of the United States in the establishment and maintenance of efficient school systems, and otherwise promote the cause of education throughout the country."—General Education Provisions Act, sec. 403a (20 U.S.C. 1221c).

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FOREWORD

The revision of Handbook IV, *Staff Accounting Classifications and Standard Terminology for Local and State School Systems,* is the result of the cooperative effort of the U.S. Office of Education (OE), a national advisory committee, and regional conference participants throughout the Nation. These groups working together have produced classifications, definitions, and coding schemes for the data elements about staff members necessary to assist administrative decisionmaking. The revision of Handbook IV places special emphasis upon the *uses* of staff information in local education agencies and, in particular, upon the relationship of the staff file to the system files in the other handbooks of this series.

This is a revision of the fourth handbook in the original State Educational Records and Reports (SERR) series. Handbook I, *The Common Core of State Educational Information,* was published by the Office of Education in 1963. Handbook II, *Financial Accounting for Local and State School Systems,* was completed in 1957 and revised in 1973. Handbook III, *Property Accounting for Local and State School Systems,* was published in 1959. The original version of Handbook IV, published in 1965, was developed concurrently with Handbook V, *Pupil Accounting for Local and State School Systems,* completed in 1964. The latter is also currently being revised. Handbook VI, *Standard Terminology for Curriculum and Instruction in Local and State School Systems,* and Handbook VII, *The State Education Agency,* were published in 1970 and 1971, respectively.

Allan R. Lichtenberger, *Chief*
Educational Data Standards Branch

Dorothy M. Gilford,
Assistant Commissioner
for Educational Statistics

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Chapter 1

OVERVIEW OF HANDBOOK IV

The purpose of this chapter is to acquaint the LEA administrator with the purpose, scope, structure, and usefulness of this handbook. It is a macroscopic view of the contents. More specific details are presented in the following chapter.

The design is to move the reader sequentially from this overview to a more detailed discussion of the uses of staff information and then to the actual classification of data elements—developing along the way an understanding of the processes involved. This progression should (1) conserve the reader's time by directing attention to those areas which meet his or her needs, and (2) enhance the usefulness and comprehensibility of the handbook.

The handbook identifies, defines, and organizes pertinent staff data into a classification structure and explains how the classification structure can be used for administrative decisionmaking in the local education agency (LEA.)[1] The handbook covers information about staff members in both public and nonpublic educational institutions, including elementary, middle/junior high, and high schools, vocational-technical schools, and special education and adult/continuing education learning centers.

INFORMATION NEEDS OF THE LOCAL EDUCATION AGENCY

Information about staff is a primary educational resource basic to the management of LEA's and to education throughout the country. Since data should be organized to be usable, the administrator and other LEA officials must have a basis for developing a system to accumulate data about staff members, their characteristics, activities, assignments, and services. This requires standardized and up-to-date terminology, classified and codified to fit into a modern information system. The data also must be comparable to data from other LEA's if administrators expect to communicate among themselves and fulfill State and Federal reporting requirements.

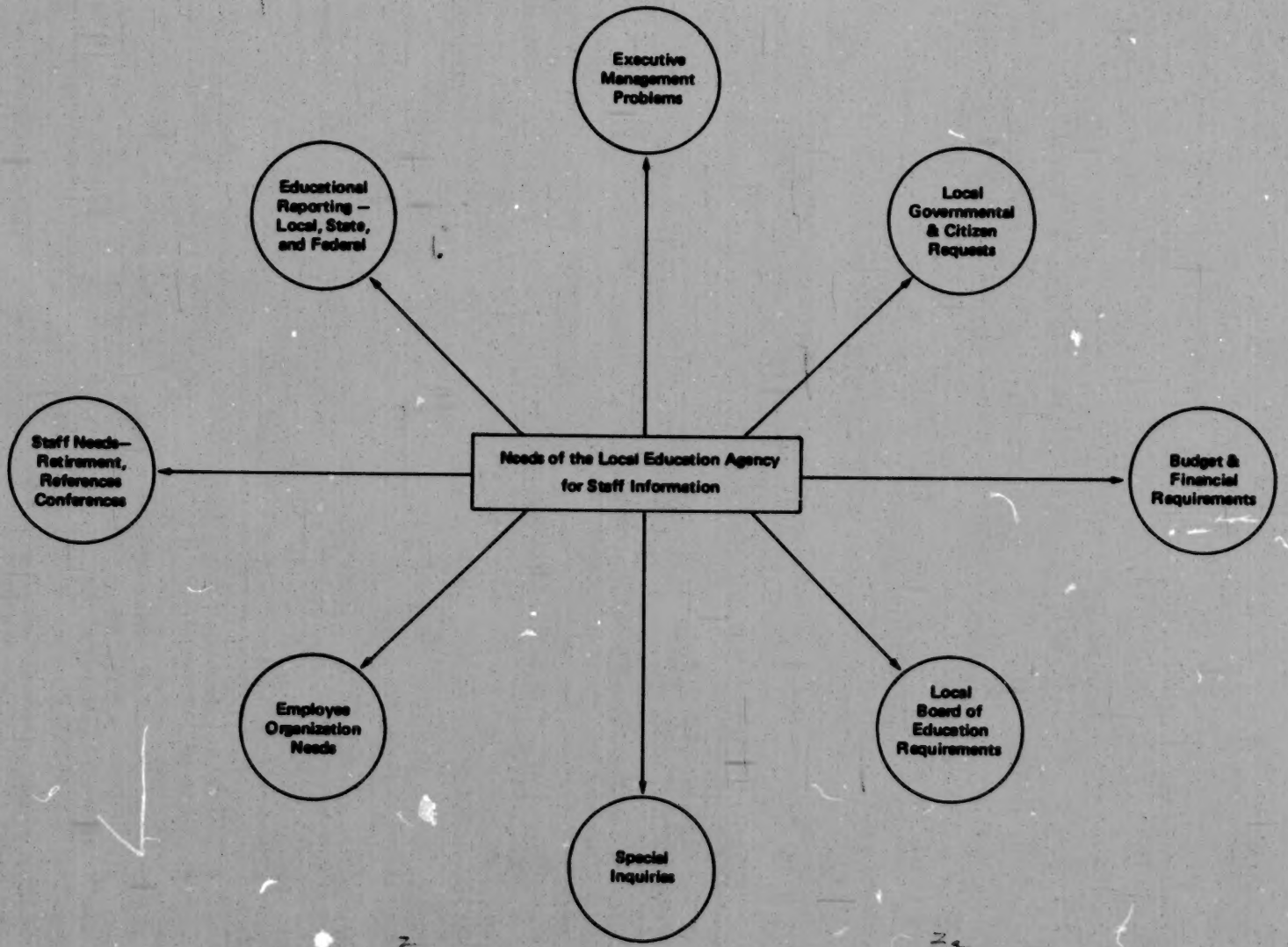
Figure 1 depicts the importance of staff information to the LEA in terms of its needs and its management challenges. In addition to the reporting and management planning needs already mentioned, an administrator is confronted with requests from community and local governmental groups for various types of information, such as pupil-teacher ratios and racial balances. He has the obligation to maintain personnel data for tax and retirement purposes as well as for transfers, promotions, and references. In order to compute manpower and fiscal requirements for the coming years, an administrator must have current and accurate data on the numbers and various competencies of staff members employed by the LEA. Requests from employee organizations for salary, contract, and related employment data are increasing, along with demands from concerned citizens to know exactly where and how education dollars are being spent. These and numerous other demands placed upon the LEA administrator necessitate a large volume of data on all aspects of the LEA, especially on staff.

The basic purpose of Handbook IV is to provide a means and a framework for the accumulation of necessary data about staff members. The handbook is intended only as a guide; the ultimate decisions regarding to what extent staff data should be collected, how the collected data should be maintained, and how many of the suggested processes should be implemented rest with local officials.

The revision of Handbook IV should be of greater use to school officials than its predecessor. In addition to serving, as did the original version, as a means for improving standard terminology for reporting, the revision is designed to assist LEA's in accumulating data elements in a manner suitable for administrative decisionmaking.

[1] Handbook IV deals only with staff members of the LEA; State education agency staff data are dealt with in Handbook VII, *The State Education Agency*.

Figure 1.–Importance of staff information to the local education agency


Executive Management Problems
Educational Reporting – Local, State, and Federal
Local Governmental & Citizen Requests
Staff Needs– Retirement, References Conferences
Needs of the Local Education Agency for Staff Information
Budget & Financial Requirements
Employee Organization Needs
Local Board of Education Requirements
Special Inquiries

STRUCTURE OF THE HANDBOOK

The rest of this chapter will describe the basic structure of the remainder of the handbook, which includes:

Chapter 2 - The Interrelationships Among the Handbooks in the Series
Chapter 3 - Description of Handbook IV
Chapter 4 - Classification of Staff Data
Chapter 5 - Definitions of Data Elements in the Classification Structure
Chapter 6 - Units of Measure
Appendix A - U.S. Office of Education Publications (Other Than the SERR Series) Referenced in This Handbook
Appendix B - Examples of Criteria for Evaluation of Staff Member's Job Performance
Appendix C - Glossary
Appendix D - Afterword
Appendix E - Acknowledgments

Chapter 2 - The Interrelationships Among the Handbooks in the Series

The handbooks in the Office of Education State Educational Records and Reports series (identified in the foreword) have been designed to facilitate the collection and maintenance of data for decisionmaking at the local level and the reporting of educational information to other users. Chapter 2 describes a program structure for a local education agency which combines with the information in the handbook series to form the basis for development of the program aspects of an educational information system. The interrelationships among the handbooks also provide common terms and descriptions for use among educational agencies involved in the planning, operation, and evaluation of educational programs.

The classification of staff data in Handbook IV is an integral part of the interface among the handbooks; this interface is developed according to the LEA program structure.

Chapter 3 - Description of Handbook IV

Chapter 3 considers some of the general factors involved in organizing and using a staff information subsystem.

The staff handbook is structured to provide (1) for the accumulation and accession of items of information about staff in two or three interrelated files (permanent, assignment, and payroll) and (2) a categorized and coded list of data items for reference purposes. In order to obtain meaningful information from these individual data elements, it is necessary to interrelate elements from the following nine data dimensions:

- Personal and Health Information
- Education and Experience
- Job Classification and Activity Assignment
- Function and Program Assignment
- Subject Matter Area
- Conditions of Current Assignment
- Current Employment
- Career Development
- Separation

To make use of the staff data described in the handbook, an LEA must accumulate the data and develop some sort of easily accessible file or information storage system. One possible system for staff files is suggested in chapter 3; it includes three types of files for each staff member:

- *Permanent File.* For staff data that seldom or never change;
- *Permanent File (Short Form).* A brief synopsis of data which is kept after it is no longer necessary to maintain all the data in the Permanent File;
- *Current Operating Files.* For data which are likely to change. Among the files falling into this category would be the *Payroll File* (for data necessary to support the payroll system and to generate related reports) and the *Assignment File* (for data relative to the staff member's current assignment).

The functioning of the staff files is illustrated through three examples of administrative processes: promotion and internal transfer, employment, and separation due to resignation.

Finally, the use of the files in the reporting process is demonstrated through the generation of several sample staffing reports from the LEA administration to the local board of education and the State education agency (SEA).

Chapter 4 - Classification of Staff Data

Chapter 4 contains the list of data elements about staff members, organized into a detailed classification

structure. The interrelationship of the data elements within the nine major dimensions produces the information necessary for reporting and staff administration processes. In addition, the standardized terminology is the basis for interrelating data from the other handbooks into a program structure.

Chapter 5 - Definitions of Data Elements in the Classification Structure

Chapter 5 provides the same classification structure as chapter 4 but includes definitions for the data elements.

Chapter 6 - Units of Measure

This chapter defines some useful staff measures and suggests examples of ratios, rates, and quantitative units.

Appendixes

Appendix A contains references for coding degrees, higher education institutions, and other elements relating to staff. Sample criteria for evaluating staff member's job performances are included in appendix B. Appendix C contains a glossary of the most prominent terms in the handbook plus others in the handbook series having revelance for staff administration. Appendix D describes the development of the handbook and appendix E acknowledges most of the individuals who contributed to its production.

Educators have long recognized that two fundamental elements essential to meaningful evaluation of the education process are a common language and a basis on which to develop a system to communicate information. Handbook IV, in conjunction with the other handbooks in the SERR series, attempts to provide these fundamental elements. However, it is only with cooperation and action by State, local, and Federal education agency administrators and officials that such a system can be established and used to the greatest advantage.

Chapter 2

THE INTERRELATIONSHIPS AMONG THE HANDBOOKS IN THE SERIES

RATIONALE OF THE HANDBOOK SERIES

The data elements in the OE State Educational Records and Reports (SERR) series are identified and classified according to the LEA program structure illustrated in figure 2. This structure represents the hierarchical organization of program elements within the LEA; it is, therefore, a logical framework for planning, reporting, and management decisionmaking.

In total, the program structure should be a graphic picture of how an LEA operates with prototype groupings of activities, functions, and programs. At the top of the pyramid is the LEA with its responsibility to provide education to the community. The basic educational function is divided into "Instruction," the "Supporting Services" necessary to provide this instruction, and "Community Services," such as recreation and library facilities.

In developing the program structure further, the "Instructional Services" function is divided into three major categories: "Regular Programs," "Special Programs" (for pupils with exceptionalities), and "Adult/Continuing Education Programs" (for adults and young people who have accepted adult roles in life).

The "Regular Program" area is the one into which most of the instructional functions of the LEA are directed, since the majority of students fall into this category. "Regular Program" instruction typically is divided into three groups of programs: "Elementary Programs," "Middle/Junior High Programs," and "High School Programs," which correspond to the three basic organizational levels of education. These three basic levels may be further divided into broad goals and objectives such as "Intellectual Skills Development," "Understanding the Environment," "Personal Development," and "Exploratory Studies." These may be subdivided further into subject matter areas (e.g., "Science"), and then into courses and units, such as "Chemistry," "Physics," "Biology," etc.

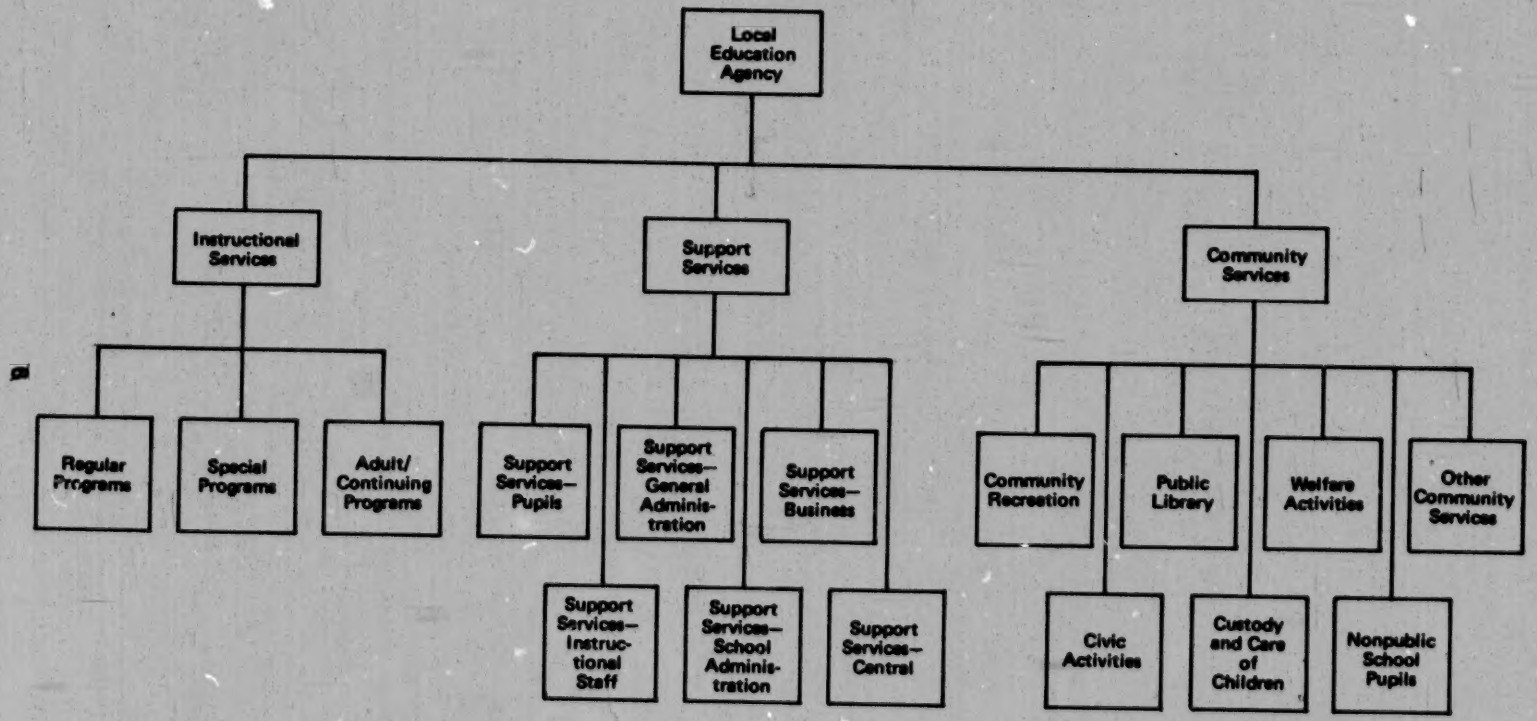
Figure 2 represents only the first few levels possible in the program structure. Under each major dimension of the structure there are several program areas; each program area can be divided into more specialized areas or programs. The overall program structure, then, pyramids all types of information about the LEA, starting with the broadest dimensions and ending with a vast number of possible subclassifications for service projects and specific courses of instruction.

This complex branching of information expands to encompass data on school finance, pupils, facilities, curriculum, community programs, and many other LEA-related areas. It is at this point that the OE handbook series interfaces with the LEA program structure (figure 2).

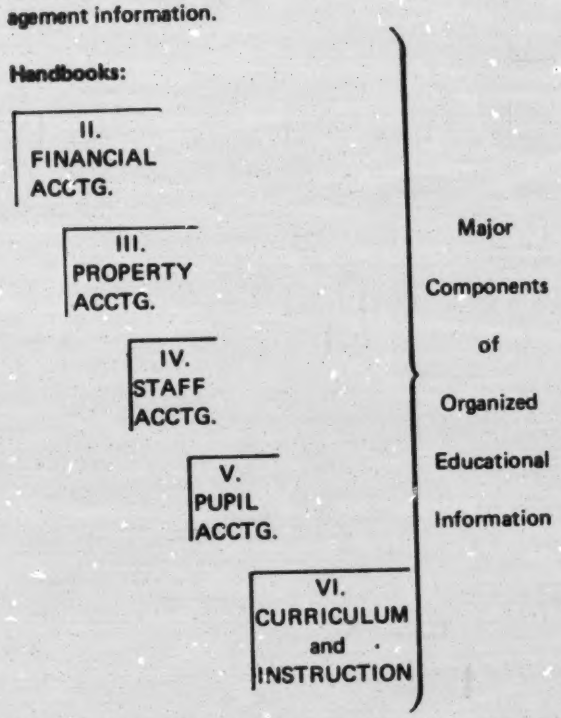
INTERRELATIONSHIPS AMONG THE HANDBOOKS

Educators are aware that school administrators need information about property, school finance, pupils, curriculum, and staff to carry out their planning and decisionmaking responsibilities. They have recognized also the usefulness of this LEA program structure in collecting and classifying these data elements. The handbooks have therefore been developed to help administrators collect and organize such essential information about LEA's. The ordering of this information into a uniform classification structure is made possible by combining, through the medium of the handbooks, the different types of data collected.

Figure 2.--Program structure of a local education agency (as set forth in Handbook II, Revised)



The diagram below illustrates the interrelationships among the handbooks which, in turn, support the goal of the program structure: organized, consistent management information.



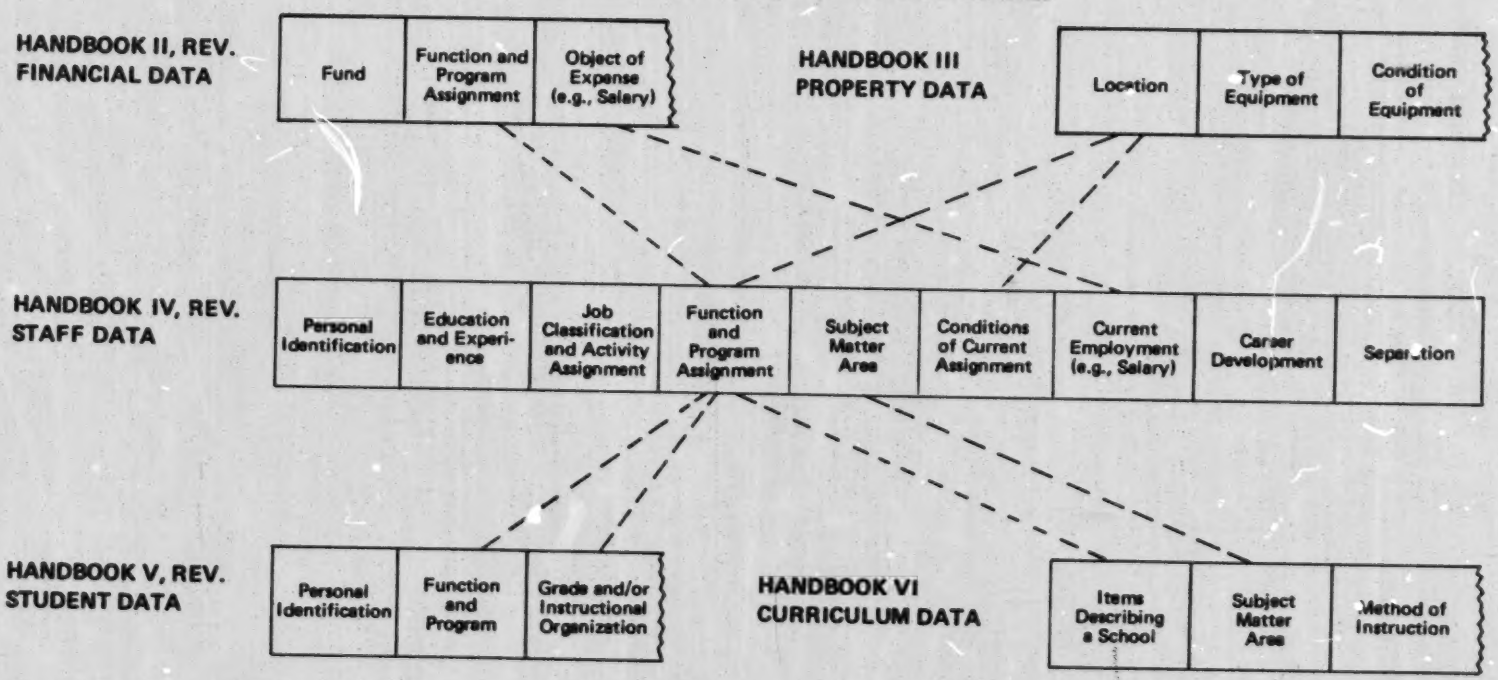
Each handbook contains specific data elements required for management effectiveness and accountability within an LEA as well as for evaluation of the entire educational process in elementary and secondary schools. Major linkages can be developed among the handbooks where the LEA has implemented handbook guidelines for information processes.

Figure 3 shows how some of the data of the various handbooks can be matched to develop information important to the administration of an LEA. The single most important bond is the common dimension of "Function and Program Assignment" (the D series in this handbook) shared by Handbooks II, IV, V, and VI. Pupil, cost, and staff data all merge in the program area. The function of "Instruction" (D1000), is the point at which data on pupils recieving instruction, the cost of providing the instruction, the staff members who instruct, and the curriculum in which pupils are involved merge into *information* about the way the LEA provides instruction. Such information is the beginning of systems development for the LEA.

Expanding upon this function/program base, the local administrator can develop other data linkages between other common dimensions of the handbooks. Each staff member whose current activity assignment involves instruction is categorized into one or more of the broad goals and objectives of the 22 subject matter areas (e.g., "Agriculture," "Science") or cocurricular activities delineated in chapter 5 of Handbook VI. Therefore, this same series in Handbook IV forms a bond between staff data and curriculum data. Salary data, as part of the Current Employment dimension of this handbook, ties into the overall salary category under *Object of Expense* in Handbook II. The physical location of an assignment is generally identified in Handbook IV, and more specifically in Handbook III, in terms of the building and room in which the assignment is performed. If carried to a greater degree of detail, these common location elements can couple staff data to property accounting data and subsequently link the staff member to a group of learners in a space or classroom.

The function of the OE handbooks in establishing, through data linkages, a basis for an LEA management information system is one of many uses of the series. Equally important to the LEA administrator are the guidelines for data collection, reporting, and decision-making which each handbook provides. Chapter 3 provides a discussion of how staff data should be collected and organized and how the data can be used in practical, day-to-day staff administrative processes and reporting.

Figure 3.--Interrelationships among the handbooks in the series



Chapter 3

DESCRIPTION OF HANDBOOK IV

Some of the factors involved in the development and use of staff information are considered in this chapter. It includes discussion of the need for staff information, a description of the way this handbook is organized, and a discussion of the handbook's use in relation to staff files, decisionmaking, and reporting.

Educators have long recognized the need for a common language to be used in the planning, operation, and evaluation of educational programs. In addition, it is essential that educational organizations be aware of the status of their resources. Staff, the primary resource of an educational system, cannot be quantified or evaluated accurately using an inadequate or underdeveloped system of data elements, especially with the emergence of progressively more complex and sophisticated LEA's.

ORGANIZATION OF THE HANDBOOK

This handbook has been organized around nine broad data dimensions which form a classification structure for the accumulation of data about staff members and their employment relationship with the LEA. These dimensions (which are listed in chapter 4 and defined in chapter 5) include:

A. Personal and Health Information

The A series provides a reference source from which detailed data pertaining to a staff member's address, health, and vital statistics can be extracted. Data of this type provide fairly permanent information which does not vary significantly from year to year.

B. Education and Experience

The data in the B series describe the staff member's formal education, credentials, inservice and other training, prior employment, and other experiences related to his or her job qualifications. The categories on education, credentials, and training are designed to be cumulative as the staff member continues his or her education or completes additional training; however, the data on prior work experience would not change.

C. Job Classification and Activity Assignment

The C series provides two types of data concerning the nature of the job assigned to the staff member:

(1) Classification of the staff member's assignment into a job class requiring any of the following types of skills:

- "Official/Administrative"
- "Professional—Educational"
- "Professional—Other"
- "Technical"
- "Office/Clerical"
- "Crafts and Trades"
- "Operative"
- "Laborer"
- "Service Work"

(2) Classification of the staff member's assignment to the specific tasks and activities commensurate with assigned responsibilities. This is referred to as an "activity assignment"; examples of activity assignments are "Accounting," "Evaluating," "Teaching," etc. (Activity assignments always refer to the staff member's assigned job and not to the individual's personal qualifications.

D. Function and Program Assignment

The D series (taken from Handbook II) provides detailed data regarding the nature of the function and program or support service to which the staff member has been assigned. The data in this section, unlike those in "Personal and Health Information," can vary with

changes in assignment and thus may change significantly for a staff member from year to year or over a shorter time interval.

E. Subject Matter Area

The E series identifies the 22 major subject matter areas (taken from Handbook VI) into which the "Instructional" function can be categorized. Staff members with "Teaching" assignments can be grouped under one or more of these subject areas.

F. Conditions of Current Assignment

The F series provides several types of data describing the staff member's current assignment in relation to the organizational structure of the LEA. These data include the work location and actual scheduled hours of the staff member's assignment. The data also indicate the scope of the staff member's assignment (e.g., systemwide or within a single school) and the duration of the assignment in relation to the number of school terms in the school year.

G. Current Employment

The G series describes the conditions pertaining to the employment relationship between the staff member and the LEA. It includes data on probationary, temporary, or tenure status, contractual status, conditions of employment, salary, insurance, means of introducton to the LEA, retirement, leaves of absence, and full-time/part-time status.

H. Career Development

The H series provides data pertaining to the staff member's performance evaluation, potential for advancement, and career development needs. These data give the administrator a reasonably substantial foundation of information for an objective appraisal of performance; they should also assist the administrator in selecting programs and activities to enhance the staff member's development.

I. Separation

The I series describes the conditions and circumstances under which the staff member and the LEA sever their employment relationship. Although separation is generally designated as "voluntary" or "involuntary," subclassifications are useful in determining overall patterns in staff turnover and, hence, in planning.

The separation action also contains information as to whether the staff member is eligible for reemployment by the LEA.

Assembly of Data into Information

In order for information to be usable to an LEA administrator, the data elements in the classification structure cannot be regarded as isolated units; data from two or more dimensions must be combined into a relationship. For example, it is necessary to combine the C and D series to identify the staff member's current assignment—what job he or she performs and in what program. Both data components are essential to produce information since the C series is a grouping of generic activities performed within an LEA, and the D series deals with specific functions and programs to which these activities must be related. It is not sufficient to know that a staff member has a "Foreman" assignment (C1006) in the "Official/Administrative" job classification, without knowing whether (in this example) he or she works in "Building Acquisition, Construction, and Improvement Services" (D2535) or "Care and Upkeep of Grounds Services" (D2543). Conversely, data which show only that a staff member is in "Public Information Services" (D2633) would not reveal if he or she is serving as a "Public Relations Expert" (C3020), a "Clerk" (C5002), or a "Graphic Artist" (C4004). The *combination* of single data elements from the two series results in information about the staff member's assignment.

"Scope of Assignment" (F1100) is a necessary third dimension in pinpointing a staff member's assignment, since it reveals not only the LEA level and location at which each assignment is performed but, in some cases, the level of responsibility and timing of activities. For example, scope will identify whether a staff member with a "Supervising/Managing/Directing" assignment (C1010) in "Fiscal Services" (D2520) has responsibility for a single school or for the entire LEA. In addition, the scope dimension records itinerant assignments (e.g., an audiologist or psychometrist), where the staff member works on a regular basis in more than one school, and also records the number of pupils served per day and per week.

Another basic data relationship is that between "Subject Matter Area" (E series) and the "Instruction"

function (D1000). When combined with those activity assignments related to teaching (e.g., "Teaching," "Teaching Intern," "Student-Teaching," "Teaching Aide," and "Teaching Assistant" assignments), these data elements provide information about the specific subject(s) a staff member teaches or helps to teach.

These elementary relationships provide ways of relating staff data, ranging from a simple system in which duplicate records are placed in separate files, to a sophisticated electronic system capable of sorting through, choosing, and assembling many individual elements. Given these dimensions, therefore, it is possible for an administrator to combine the data elments in as many different ways as are needed. It is possible, for example, to obtain the number of staff members in the job classifications of "Official/Administrative" through "Professional—Other" (C1000-C3000) who are not eligible for the retirement program, or the salary ranges of staff members broken down by ethnic group, or a list (for planning purposes) of all staff members who are certificated to teach in more than one subject matter area but who currently teach in only one. The classification structure in this handbook provides the means for collecting and organizing individual data elements which when combined into functional relationships, produce staff information for decisionmaking.

Definition of a Staff Member

The term *staff member* is defined, for the purposes of this handbook, as a person whose relationship with the local education agency meets the following criteria:

- The person, under the direction of the LEA, performs activities or provides services for the LEA.
- The person is either compensated for such services by the LEA and is considered an employee for the purpose of workmen's compensation coverage, the Federal Insurance Contribution Act (FICA), and wage or salary tax withholdings; or the person performs such serivces on a volunteer, uncompensated basis. (The LEA should collect the same data—depending upon the assignment—about every employee, whether paid or unpaid.)

Personnel who do not meet the above criteria occasionally must be included in reports to governmental agencies and departments. These are usually persons who are performing services for the LEA while maintaining an employment relationship with a third party, such as a building contractor or a food service contractor. Normally, reports should specify whether persons in this latter category are to be included in the report responses. In addition, depending upon State and Federal regulations, the LEA may have the responsibility to see that the third party maintains data on its employees similar to staff data collected by the LEA.

USE OF THE HANDBOOK

In order to use effectively the classification structure of data elements described in this handbook, an LEA must develop some sort of file or information maintenance system. Although this system may vary in form and may involve a variety of mechanical devices or equipment, it should be designed and operated to conform to *at least* the general criteria listed below. Local education agencies should attempt, wherever possible, to further refine or to supplement the following criteria in accordance with their own particular needs and constraints:

(1) *The staff files should be designed to provide information for use in both:*

- the daily personnel administration process, including identification of candidates for staff needs, and
- reporting and data summarization.

The LEA should avoid duplicate files, wherever possible, for each of the above purposes.

(2) *The staff files should be designed to store only enough information for a reasonable anticipation of operating and reporting needs.* A common tendency is to design the files to store an excessive amount of minutiae which will require more than a reasonable amount of maintenance. On the other hand, the files should have a sufficiently broad data base to avoid unnecessary and costly gathering of data from sources other than the staff files.

(3) *The staff files should be designed to facilitate their own maintenance and updating, regardless of their form.* Forms and records which permit easy deletion of outdated data and easy addition of current data are preferable to forms

and records which must be replaced each time a change takes place.

(4) *Specific responsibility should be assigned for maintenance of the staff files, and a fairly rigid schedule of maintenance should be established.*

(5) *Guidelines should be established, in writing, detailing the conditions under which information from the files may be used (i.e., who may extract and use information, what may be extracted, when, and to what purpose).* The guidelines should outline specifically what information can be obtained with or without the superintendent's approval and with or without the staff member's approval. The guidelines should also cover reproduction of file information. It is extremely important that these guidelines be established in accordance with local, State, and Federal laws and court decisions pertaining to information confidentiality.

Use of Staff Files

One method of developing staff files is described below for a hypothetical LEA (with approximately 450 staff members) using a manually recorded system. The system consists of the following basic, interrelated files for each staff member. (The data elements shown within each file are only suggested; in actual use, they should be expanded or reduced to fit the needs of the local administrator.)

• *Permanent File*—This file records and maintains the permanent and updated data about the staff member during his employment. The kinds of data found in the Permanent File are illustrated in figure 4; the code numbers refer to the data element classification structure in chapter 4.

The file for this hypothetical LEA was designed around the nine data dimensions previously described, allowing for flexibility in its format so that an expandable number of entries might be made under each category. In addition, as any of the staff member's assignments, qualifications, or performance evaluations change or are updated, the old data are transferred from the Assignment File to the Permanent File to give a cumulative history of the staff member's employment.

• *Permanent File (Short Form)*—This file synopsizes the few most basic elements of data regarding the staff member and retains these data indefinitely. Examples of such data include:

—Legal Name (A1110)
—Employment Date (G1200)
—Social Security Number (A1130)
—Address at Separation (A3110)
—Last Activity Assignment (C Series)
—Last Function and Program Assignment (D Series)
—Type of Separation (I1000)
—Eligibility for Reemployment (I3000)
—Date of Separation (I4000)
—Final Salary (G2100)

• *Current Operating Files*—These files contain data which are likely to change. Because changes will relate most often to the staff member's assignments and because assignments constitute a great proportion of the data reported to local, State, and Federal agencies, current operating files are the basic resource available to the superintendent in making decisions and preparing such reports. The *Assignment File* and the *Payroll File* represent two examples of frequently used current operating files.

• *Assignment File*—Since this file (figure 5) is essentially "assignment oriented," it maintains some of the same data on the staff member's qualifications as the Permanent File. In addition, the Assignment File itself may be maintained in more than one place; a copy may be kept by the staff member's immediate supervisor as well as in the central office with all other files. This maintenance of data in more than one place is justified because qualifications data, in particular, are useful to supervisors in management. It not only is invaluable as a resource providing data and information for reporting purposes, but also provides succinct data for evaluating staff member's qualifications and performance in light of present and future staff requirements. The file also serves as a locator since it includes specific data on each staff member's work location.

The Assignment File is designed to maximize flexibility and to reduce the effort required for its maintenance. As elements become outdated or change, they are transferred to the Permanent File. Also, the Assignment File normally should be used to update a staff member's Permanent File at the time of his separation.

• *Payroll File*—This file maintains all the data

Figure 4.--Sample permanent file for local education agency

Personal Data		Qualifications		Position(s) (In Full-Time Equivalency)		Performance		Separation	
Legal Name	(A1110)	Education and Credentials	(B1000)	Job Classification and Activity Assignment	(C Series)	Quality of Performance Evaluations	(H1000) (H1100)	Type of Separation	(I1000)
Social Security Number	(A1130)	Formal Education	(B1100)	Function and Program Assignment	(D Series)			Reason for Separation	(I1200)
Marital Status	(A2110)	Highest Year Completed	(B1110)	Subject Matter Area	(E Series)			Eligibility for Reemployment	(I1300)
Address	(A3110)	Type and Name of Highest Degree	(B1131)	Scope	(F1100)			Date of Separation	(I1400)
Telephone Number	(A3210)	Institution Granting Degree	(B1132)	Service and Leave Status	(G6100)			These Data are Entered at the Time of Separation When This File Becomes Part of the Permanent File (Short Form)	
Date of Birth	(A1170)	Date of Degree	(B1133)	Timing of Current Assignment	(F1200)				
Military Service Status	(A1900)	Major	(B1141)						
Citizenship Status	(A1200)	Minor	(B1142)						
Sex	(A1150)	Additional Credit Beyond Highest Degree	(B1134)						
Racial/Ethnic Background	(A1160)	Other Education	(B1200)						
Physical Disabilities	(A4130)	Credentials	(B1300)						
Person To Be Notified in Case of Emergency	(A3300)	Name of Credential(s) Held	(B1311)						
		Expiration Date(s)	(B1315)						
		Experience	(B2000)						
		Years of Prior Education-Related Experience	(B2140)						
		Years of Prior Noneducation Experience	(B2240)						
		Related Experience	(B3000)						
		Organizational Memberships	(B3500)						
		Name of Work-Related Organizations	(B3511)						
		Offices Held	(B3513)						

Figure 5.--Sample assignment file for local education agency

Personal Data		Qualifications		Position(s) (In Full-Time Equivalency)		Performance		Leave Status	
Legal Name	(A1110)	Education and Credentials	(B1000)	Job Classification and Activity Assignment	(C Series)	Quality of Performance	(H1000)	Current Leave	(G6200)
Social Security Number	(A1130)	Formal Education	(B1100)	Function and Program Assignment	(D Series)	Evaluations	(H1100)		
Address	(A3110)	Highest Year Completed	(B1110)	Subject Matter Area	(E Series)	Possible Positions for Transfer	(H2000)		
Telephone Number	(A3210)	Type and Name of Highest Degree	(B1131)	Scope	(F1100)				
Person to be Notified in Case of Emergency	(A3300)	Institution Granting Degree	(B1132)	Service and Leave Status	(G6100)				
		Date of Degree	(B1133)	Timing of Current Assignment	(F1200)				
		Major	(B1141)	Date of Beginning of Assignment	(F1240)				
		Minor	(B1142)	Location	(F2200)				
		Additional Credit Beyond Highest Degree	(B1134)	Schedule	(F3000)				
		Other Education	(B1200)						
		Credentials	(B1300)						
		Name of Credential(s) Held	(B1311)						
		Expiration Date(s)	(B1315)						
		Experience	(B2000)						
		Years of Prior Education-Related Experience	(B2140)						
		Years of Prior Noneducation Experience	(B2240)						
		Related Experience	(B3000)						
		Organizational Memberships	(B3600)						
		Name of Work-Related Organizations	(B3611)						
		Offices Held	(B3613)						

necessary to prepare the staff member's paycheck or voucher each payroll period and also provides data for reports and summaries. The Payroll File combines both permanent and current data and is designed, as much as possible, around the nine data dimensions in the classification structure. Because of the relationship of this particular file to payroll operations, however, it contains certain additional quantitative data not required within the nine dimensions of data, such as cumulative deductions and earnings and amount of leave accrued.

A copy of the last Payroll File should become part of the Permanent File at the time of the staff member's separation.

A sample design of the Payroll File is presented in figure 6.

SAMPLE STAFF ADMINISTRATIVE PROCESSES

This section of the chapter is concerned with (1) how the staff files just discussed are used in daily administrative processes, and (2) how data flow into the files and are extracted when needed. (A later section of this chapter discusses how these files help to generate information for staffing reports.)

The following common administrative processes are given as examples of the uses of the staff files:

- the promotion and internal transfer process
- the teacher employment process
- separation due to resignation

The basic steps of each administrative process are flowcharted in figures 7, 8, and 9. The figures illustrate the flow of both action and information and the persons or organizations involved in the processes. When data elements are either collected or stored in a file during a process, the key elements are listed below the appropriate step. The position in which the decision is made in a sample process does not necessarily represent the hierarchical structure of decision-making in each LEA. In many LEAs, the person who makes staff decisions is the superintendent; in others, it is the principal or personnel officer; and in some LEAs, these administrators form a team in making staff decisions.

Sample Promotion and Internal Transfer Process.—Figure 7 describes the promotion and internal transfer process of a staff member within a hypothetical LEA. The left vertical axis shows the persons and organizations who contribute most frequently to this process. In this example, the principal of a school initiates the process by forwarding a written request to fill a vacant position to the superintendent (or his designated representative) for approval. (Some of the data which the principal might supply the superintendent about the job are listed below the block labeled "Request for Staff Member.")

In this situation, the personnel officer sends a notice of the vacancy to LEA staff members to determine if any member is interested in filling the vacancy. For some staff members, the move would involve a promotion; for others, a lateral transfer of position would be necessary.

As a result of interest expressed by several staff members, the superintendent asks the personnel officer to determine whether their backgrounds and qualifications generally conform to the requirements of the position. The personnel officer refers to the Assignment Files of the staff members in making this analysis.

If no staff members are interested in the position, the superintendent may request that the personnel officer search the Assignment Files to discover if there are any staff members with applicable backgrounds. If some members do have the appropriate background, the superintendent may decide to discuss with them the possible advantages to be gained by accepting the assignment. Finally, if the superintendent selects from among those staff members, he obtains approval from the board of education and initiates feedback as shown in the employment process. In this instance, however, any appropriate assignment changes must also be posted to the staff member's Assignment and Payroll Files.

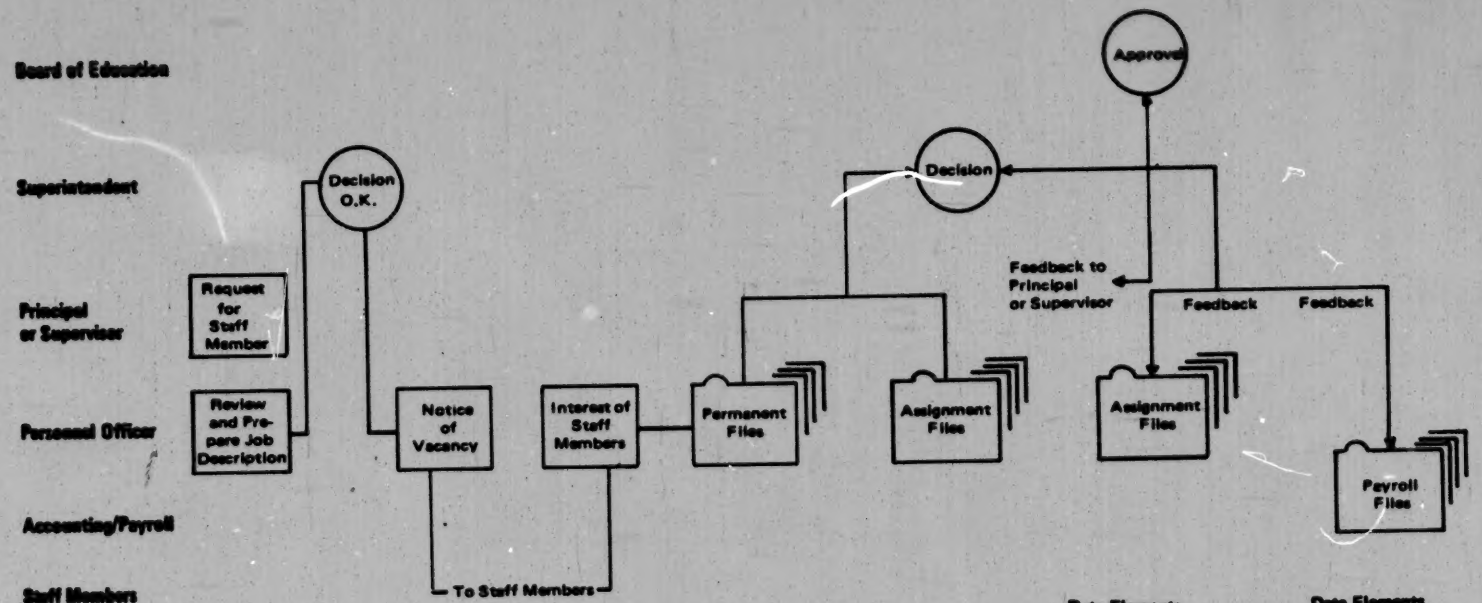
Sample Teacher Employment Process.—Figure 8 illustrates the employment process for a teaching position within the same hypothetical LEA. The assumption is made that the process described above already has been completed, and no current staff members are interested in and/or qualified for the teaching position. As in the promotion and internal transfer process, the principal forwards a request for an additional staff member through the personnel officer to the superintendent for approval. In making his decision, the superintendent may consider anticipated growth in student enrollment, the need for development of additional programs and services, and the capability of present staff members to absorb this

Figure 6.–Sample payroll file for local education agency

Personal Data	Hours Worked	Salary	Earnings	Deductions	Leave Status
Legal Name (A1110) Social Security Number (A1130) Address (A3110) Telephone (A3210) Date of Employment (G1210) Employment Status (G1300) FLSA Status (G1700) Exemptions: State/Federal/ Local (A2130) Operational Unit to Which Assigned (F2100) Function to which Assigned (D Series)	Service Status (G1300) *Regular Hours Worked This Week *Cumulative Regular Hours Worked *Overtime Hours Worked This Week *Cumulative Overtime Hours Worked	Contractual Status (G1400) *Salary Grade or Category Salary or Wage (G2100) Other Salary (G2200)	*Regular Salary This Period *Other Salary This Period *Overtime This Period *Gross Salary This Period	Health Insurance (G3100) Life Insurance (G3200) Retirement (G5100) Other Payroll Arrangements (G4000) *Cumulative Deductions of All Types Federal Tax (A2100) State Tax (A2200) *Employee Organizations *Bonds	Type (G6200) *Prior Year Balance *Earned This Pay Period *Used This Pay Period *Cumulative Balance *Maximum Carryover

*Because these quantitative data apply only to payroll, they are not part of the classification structure.

Figure 7.–Sample promotion and internal transfer process



Data Elements

Job Class. and Activity Assignment (C Series)
Function and Program Assignment (D Series)
Subject Matter (E Series)
Scope of Assignment (F1100)
Operational Unit to Which Assigned (F2100)

Data Elements

Job Class. and Activity Assignment (C Series)
Function and Program Assignment (D Series)
Subject Matter (E Series)
Scope of Assignment (F1100)
Timing of Assignment (F1200)
Operational Unit to Which Assigned (F2100)
Salary or Wage (G2100)

Data Elements

Personal Data (A Series)
Education and Credentials (B1000)
Experience (B2000)
Membership (B3500)

Data Elements

Personal Data (A Series)
Job Class. and Activity Assignment (C Series)
Function and Program Assignment (D Series)
Subject Matter (E Series)
Performance (H1000)

Data Elements To Be Updated

Job Class. and Activity Assignment (C Series)
Function and Program Assignment (D Series)
Subject Matter (E Series)
Operational Unit to Which Assigned (F2100)

Data Elements To Be Updated

Salary or Wage (G2100)
Job Class. and Activity Assignment (C Series)
Function and Program Assignment (D Series)
Operational Unit to Which Assigned (F2100)

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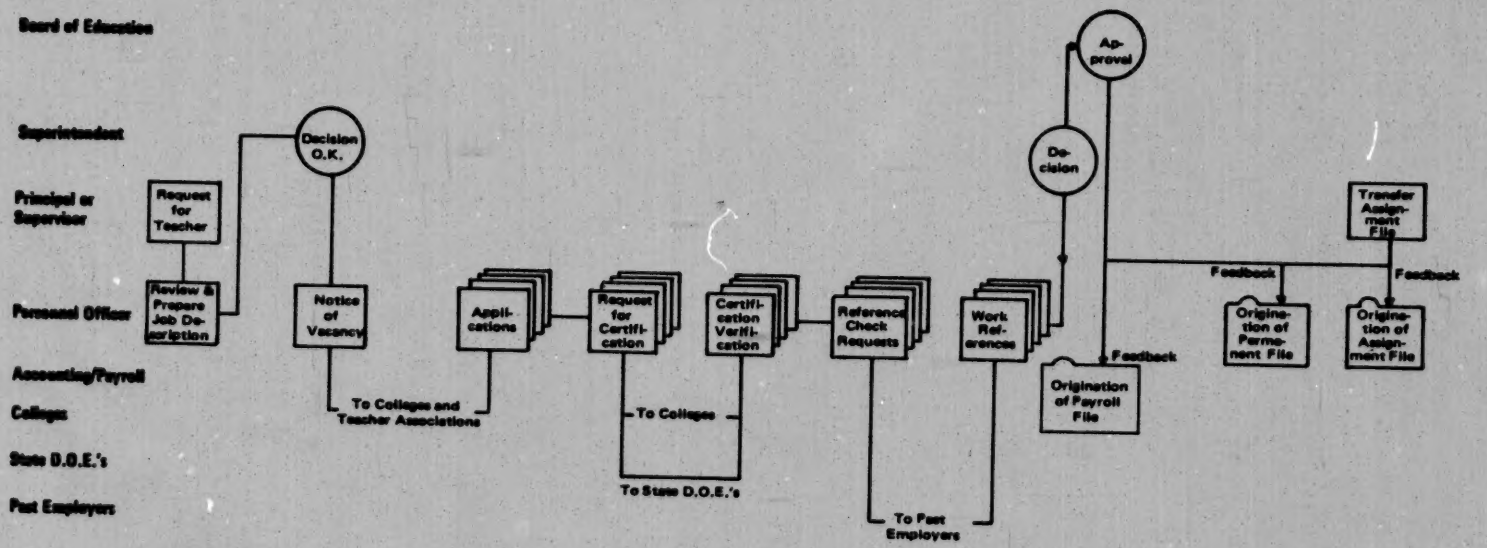
Figure 8.–Sample teacher employment process



Data Elements

Job Class. and Activity Assignment (C Series)
Function and Program Assignment (D Series)
Subject Matter (E Series)
Scope of Assignment (F1100)
Timing of Assignment (F1200)
Operational Unit to Which Assigned (F2100)
Location of Assignment (F2200)

Data Elements

Job Class. and Activity Assignment (C Series)
Function and Program Assignment (D Series)
Subject Matter (E Series)

Data Elements

Legal Name (A1110)
Soc. Sec. No. (A1130)
Sex (A1150)
Date of Birth (A1170)
Mil. Serv. Status A1200)
Citizenship Status (A1300)
Marital Status (A2110)
Residence (A3000)
Telephone No. (A3210)
Prior Education—Related Experience (B2100)
Prior Noneducation Experience (B2200)
Credit Beyond Highest Degree (B1134)
Major (B1141)
Minor (B1142)
Work-Related Organizations (B3910)
Credential Information (B1300)

Data Elements

Name of Credential (B1311 or 1331)
Issuing Agency (B1312 or 1332)
Date of Issuance (B1313 or 1333)
Date Renewed (B1314 or 1334)
Expiration Date (B1315 or 1335)

Data Elements

Dates of Employment (B2110, B2210)
Names of Employers (B2121, B2221)
Nature of Assignments (B2130, B2230)
Performance (H1000)

Data Elements

Personal Data (A Series)
Service Status (G6100)
Contract Salary (G2100)
Other Salary (G2200, G2400)
FLSA Status (G1700)
*Cumulative Earnings Data
*Deductions

Data Elements

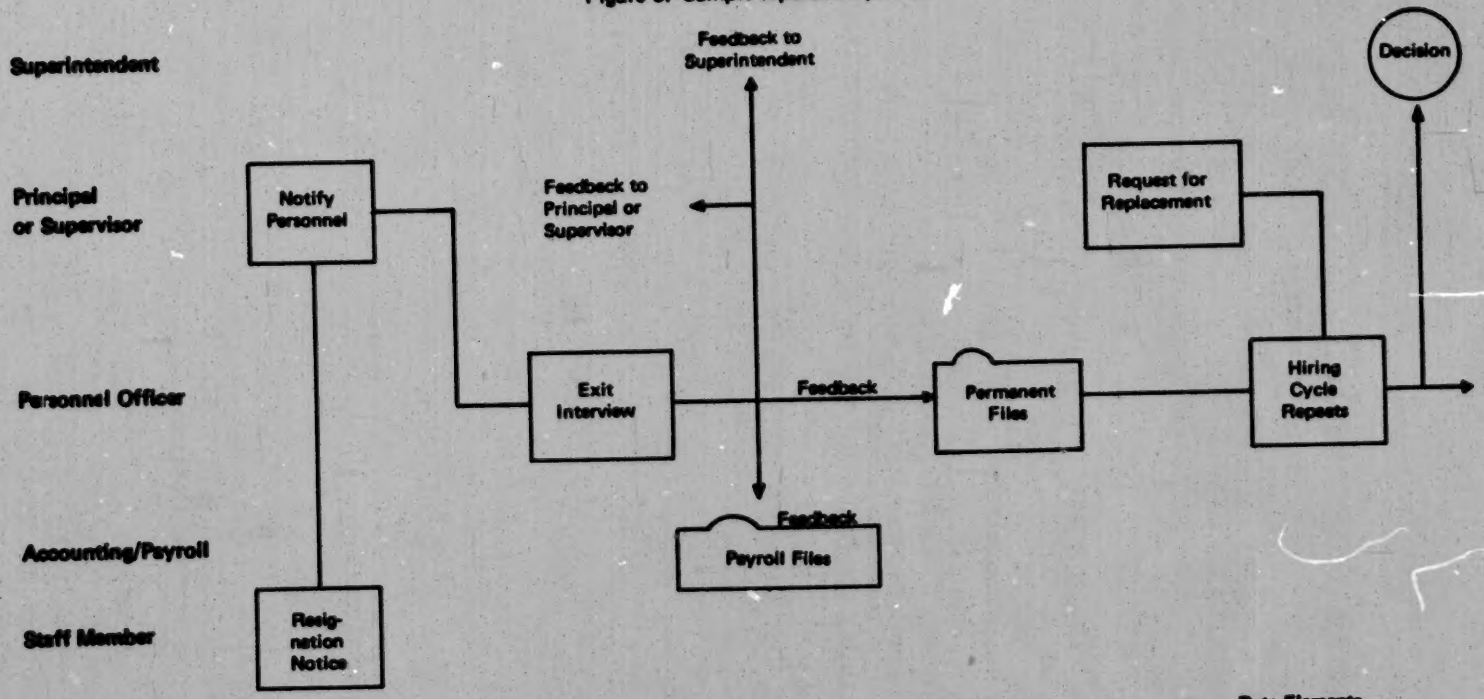
Personal Data (A Series)
Education and Credentials B1000)
Experience (B2000)
Memberships (B3600)
Career Development (H Series)

Data Elements

Personal Data (A Series)
Job Class. and Activity Assignment (C Series)
Function and Program Assignment (D Series)
Subject Matter (E Series)
Conditions of Current Assignment (F Series)

*Because these cumulative data apply only to payroll, they are not part of the classification structure.

Figure 9.–Sample separation process



Data Elements

Legal Name (A1110)
Job Class. and Activity Assignment (C Series)
Conditions of Current Assignment (F Series)
Anticipated Date of Separation (I4000)

Data Elements

Legal Name (A1110)
Soc. Sec. No. (A1130)
Date of Separation (I4000)

Data Elements

Type of Separation (I1000)
Reason for Separation (I2000)
Eligibility for Reemployment (I3000)
Date of Separation (I4000)

Data Elements

Job Class. and Activity Assignment (C Series)
Function & Program Assignment (D Series)
Subject Matter (E Series)
Conditions of Current Assignment (F Series)

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additional assignment within the contraints of their present workloads.

The LEA, through the personnel officer in this example, notifies all potential sources of candidates for the position, with particular emphasis on teacher education institutions and teachers' associations. The notice includes the skills required and the program description of vacancy which are defined in the data elements from the "Job Classification" and "Activity Assignment" series and "Function and Program Assignment" series. As a result of this notification, the LEA receives applications from several candidates who are interested in and qualified for the opening. They are screened to five who, in turn, are interviewed.

As a result of the interviews, the personnel officer chooses the top three candidates, and requests a certification verification as well as a reference check on each of them. The personnel officer forwards the appropriate forms to the State education agency for certification verification, while each of the past employers of the candidates receives a request for work references. These references and verifications are received by the personnel officer who evaluates them.

The decision is made ultimately to hire one of the candidates. Upon the candidate's acceptance of the job offer, the superintendent recommends a candidate to the board of education and notifies several key persons, including the personnel officer and the principal to whom the new staff member will be assigned for employment. Prior to the new staff member's first day of work, the personnel officer notifies the employee's supervisor and the accounting/payroll office (among other pertinent staff) and supplies them with appropriate data to originate an Assignment File and a Payroll File.

Sample Separation Process.—Although not involved heavily with information flow, separation of staff members due to voluntary resignation (see figure 9) is a common process and, therefore, is a good example of staff personnel administration.

The process begins when the staff member notifies the LEA that he or she intends to leave its employ. Frequently, local education agencies require that a notification of resignation be submitted in written form. In such cases, this notice should become part of the staff member's Permanent File.

An exit interview is usually conducted when the staff member leaves to find out the reason for separation, the staff member's evaluation of the employer, and eligibility for reemployment. The staff member often modifies insurance or benefit coverage at this point.

Each action is recorded and communicated to the appropriate persons or organizations within the LEA. As indicated, these new data should be added to the staff member's files prior to their transfer to the Permanent File.

In the final step, the employment process may begin again, with the principal or supervisor responsible for the separating employee forwarding a request to the superintendent to fill the vacant position.

SAMPLE STAFFING REPORTS

One of the most important functions of the staff files, and the classification structure as a whole, is their use in generating staffing reports from the individual school or other operational unit to higher administrative levels such as the district or LEA, the State education agency, and Federal agencies. The entire process, from collection of the data outlined in the classification structure to maintenance of the staff files to development of the reporting formats, is based on the principle that data should be collected only once, then arranged in whatever ways suit the various users' needs.

The following three staffing reports illustrate one means of using data generated originally from the Assignment Files produced at the individual school or unit (e.g., maintenance, warehouse, transportation) level. Each report presents essentially similar staffing data; the second and third reports are basically compilations of the first.

Individual School or Unit Staffing Reports.—For each school or unit in the LEA, an individual school or unit report on staff (sample shown in figure 10) could be prepared by the LEA superintendent or personnel officer from the staff members' Assignment Files, and then forwarded to the principals and supervisors of individual units (Elm Tree High School, in this example) for confirmation and/or correction of the numbers. The sample report lists Elm Tree High School staff according to their job classifications, as described in the C series, and their function and program assignments, as described in the D series.[1] If the LEA requires breakdowns into more individual acivity

[1] The business and central support services (D2500–D2600) have been grouped under a single heading for these reports. Four distinct groups of activities could be shown if desired (2300 - "General Administration," D2400 - "School Administration," D2500 - "Business," and D2600 - "Central").

Figure 10.--Individual school or unit report on staff

Elm Tree High School (Includes Adult Education Program) School or Unit

September 15, 19xx Date

SCHOOL DISTRICT OF USAVILLE
USAVILLE, USA XXXX

INDIVIDUAL SCHOOL OR UNIT REPORT ON STAFF BY JOB CLASSIFICATION AND FUNCTION/PROGRAM

Functions/Programs (Staff Reported in Full-Time Equivalencies of Assignment)	JOB CLASSIFICATION																			
	Official/ Administrative				Professional—Educational							Technical			Office/ Clerical					
	Board Members	Supt. & Asstt.	Principal & Asstt.	Other	Teachers	Counselors	Librarians/Media Specialists	Curriculum Specialists	Remedial Specialists	Other	Professional—Other	Teaching Assistants, Student-Teachers, Teacher-Interns	Other Technical	Teaching Aides	Other Office/Clerical	Crafts and Trades	Operatives	Laborers	Service Workers	Totals
Regular Programs																				
• Elementary																				
• Middle/Junior High																				
• High School					53.0							12.0		9.0	1.0					75.0
Special Programs																				
•Gifted and Talented					1.0															1.0
•Mentally Retarded																				
•Physically Handicapped																				
•Emotionally Disturbed																				
•Culturally Different																				
•Learning Disabilities					1.0															1.0
Adult/Continuing Education Programs					5.0							.5								5.5
Support Services--Pupils						3.5					2.5		2.0	1.0						9.0
Support Services—Instructional Staff							2.0	6.0					4.0	1.0						13.0
Support Services—General Administration																				
Support Services—School Administration			3.0												2.0					5.0
Support Services—Business - Central																	2.0	2.0	9.5	13.5
Community Services																				
Subtotals			3.0		60.0	3.5	2.0	6.0			2.5	12.5	6.0	9.0	5.0		2.0	2.0	9.5	123.0
Totals				3.0						71.5	2.5		18.5		14.0		2.0	2.0	9.5	123.0

SAMPLE ONLY

(This report could go to the local board of education.)

assignments (e.g., separate categories for "Teaching Assistant," "Student-Teaching," and "Teaching Intern" assignments under the block marked "Technical," or for the "Vehicle Operating" assignment under "Operative"), additional columns may be added to any report. All data for reporting should be calculated in terms of full-time equivalency of assignments. For a discussion of this method of calculation, see chapter 6, page 87.

LEA Staffing Reports.—An LEA report on staff by job classification and function/program (figure 11) could be prepared annually, or more often as needed, by the LEA superintendent or personnel officer for both the local board of education and the State education agency. Using the same data dimensions as the individual school and unit reports and summarizing them for all the units in the LEA, this report provides a breakdown on the systemwide staffing population by the staff members' job classifications and the functions and programs to which they are assigned.

A variation of this report is the LEA report on staff by job classification and school or unit (figure 12), which also could go from the superintendent to the local board of education and the State education agency. The report is a systematic summary of the staffing totals by job classification from each of the individual school reports (the totals from Elm Tree High School, shown in figure 10, appear as part of this report) plus any other LEA operational unit, such as the central office.

Depending upon the needs of the LEA, many other types of staffing reports could be generated using other dimensions of the classification structure. Staff data by subject matter area and school and by ethnic origin and job classification are combinations of dimensions frequently used for local, State, and Federal reporting.

Federal Staffing Reports.—Reports on staffing to various Federal agencies can be generated either in summary form by the State educational agency or in detailed form from individual LEA reports forwarded through the State to the Federal agency. All source data used in these Federal reports should be available to the LEA superintendent either from the staff members' current operating files or from the superintendent's own reports to the local board of education.

The data elements which comprise the staff files and which are used for the staff administration and reporting purposes described above are listed and categorized by data dimension in the next chapter.

Figure 11.--LEA report on staff by job classification and function/program

School District of USAVILLE
USAVILLE, USA XXXXXXX

September 15, 19xx Date

LEA REPORT ON STAFF BY JOB CLASSIFICATION AND FUNCTION/PROGRAM

Functions/Programs (Staff Reported in Full-Time Equavilancies of Assignment)	JOB CLASSIFICATION																			
	Official/ Administrative				Professional—Educational							Technical		Office/ Clerical						
	Board Members	Supt. & Asst.	Principal & Asst.	Other	Teachers	Counselors	Librarians/Media Specialists	Curriculum Specialists	Remedial Specialists	Other	Professional—Other	Teaching Assistants, Student-Teachers, Teacher-Interns	Other Technical	Teaching Aides	Other Office/Clerical	Crafts and Trades	Operatives	Laborers	Service Workers	Totals
Regular Programs																				
•Elementary					78.0							18.0		12.0	6.0					114.0
•Middle/Junior High					45.0							9.0		6.0	5.0					65.0
•High School					53.0							12.0		9.0	5.5					79.5
Special Programs																				
•Gifted and Talented					1.0							.5								1.5
•Mentally Retarded					1.0							1.0		1.0						3.0
•Physically Handicapped					1.0							1.0		1.0						3.0
•Emotionally Disturbed					.5							.5								1.0
•Culturally Different					.5							.5								1.0
•Learning Disabilities					1.0				4.0			.5								5.5
Adult/Continuing Education Programs					5.0							.5			.5					6.0
Support Services—Pupil						8.0					8.0		6.0		1.0					23.0
Support Services—Instructional Staff							6.5	7.0		3.5					1.0					18.0
Support Services—General Administration	5.0	2.0									2.0		2.5		2.0					13.5
Support Services—School Administration			12.0										2.5		4.0					18.5
Support Services—Business - Central		2.0									5.0		12.0		9.0	6.0	17.5	8.0	24.5	83.5
Community Services							1.0						1.0		.5					2.5
Subtotals	5.0	4.0	12.0		186.0	8.0	7.5	7.0	4.0	3.5	15.0	43.5	24.0	29.0	34.5	6.0	17.5	8.0	24.5	439.0
Totals	21.0				216.0						15.0	67.5		63.5		6.0	17.5	8.0	24.5	439.0

SAMPLE ONLY

(This report could go to both the local board of education and the State education agency.)

Figure 12.--LEA report on staff by job classification and school or unit

SCHOOL DISTRICT OF USAVILLE
USAVILLE, USA XXXXX

September 15, 19xx Date

LEA REPORT ON STAFF
BY JOB CLASSIFICATION AND SCHOOL OR UNIT

Schools or Units (Staff Reported in Full-Time Equivalences of Assignment)	JOB CLASSIFICATION																			
	Official/ Administrative				Professional—Educational							Technical		Office/ Clerical						
	Board Members	Supt. & Asst.	Principal & Asst.	Other	Teachers	Counselors	Librarians/Media Specialists	Curriculum Specialists	Remedial Specialists	Other	Professional—Other	Teaching Assistants, Student-Teachers, Teacher-Interns	Other Technical	Teaching Aides	Other Office/ Clerical	Crafts and Trades	Operatives	Laborers	Service Workers	Totals
Elm Tree High School (Includes Adult Education Program)					60.0							12.5		9.0	1.0					82.5
Oak Tree Middle School					48.0							9.0		8.0	1.0					66.0
Johnson Elementary School					41.0				2.0			11.0		6.0	1.0					61.0
Brookdale Elementary School					41.0				2.0			11.0		6.0	1.0					61.0
Support Services and Community Services	5.0	2.0	12.0			8.0	7.5	12.0		3.5	15.0		24.0		23.5	6.0	17.5	8.0	24.5	168.5
Subtotals	5.0	2.0	12.0		190.0	8.0	7.5	12.0	4.0	3.5	15.0	43.5	24.0	29.0	27.5	6.0	17.5	8.0	24.5	439.0
Totals	19.0				225.0						15.0	67.5		56.5		6.0	17.5	8.0	24.5	439.0

SAMPLE ONLY

(This report could go to both the local board of education and the State education agency.)

Chapter 4

CLASSIFICATION OF STAFF DATA

This chapter contains a classification structure for data elements about staff members. (Definitions of these data elements follow in chapter 5.) The numbering scheme in both chapters 4 and 5 is used merely to reference location within the classification structure, which contains nine major dimensions:

A - Personal and Health Information
B - Education and Experience
C - Job Classification and Activity Assignment
D - Function and Program Assignment
E - Subject Matter Area
F - Conditions of Current Assignment
G - Current Employment
H - Career Development
I - Separation

(NOTE: The LEA administrator should be aware of applicable Federal, State, and local regulations which delineate or limit the collection of staff data.)

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Chapter 5

DEFINITIONS OF DATA ELEMENTS IN THE CLASSIFICATION STRUCTURE

This chapter defines the data elements which are identified and classified in chapter 4. The classification and numbering system in this chapter is identical to that in chapter 4. Many of the definitions have been synopsized or modified from definitions in other OE handbooks. In cases where only a partial definition is given, there is a reference to a more complete definition in another handbook in the State Educational Records and Reports Series; e.g., H-VI, p. 61 refers to Handbook VI, page 61. The LEA administrator should be aware of applicable Federal, State, and local regulations which delineate or limit the collection of staff data.

A.—PERSONAL AND HEALTH INFORMATION

Personal and health data serve to identify the staff member and provide information on his health, marital status, and dependents.

A1000 PERSONAL DATA

Data which provide individual characteristics of staff members.

A1100 Identification. Data items which determine the uniqueness of a staff member.

A1110 *Legal Name.* The full name of the staff member authorized by law.

A1120 *Other or Maiden Name.* Any other name, including the name previous to marriage, by which the staff member is known.

A1130 *Social Security Number.* The number assigned to the staff member by the Social Secutiry Administration.

A1140 *Other Identification Numbers.* The numbers assigned to the staff member by the LEA or State agency for identification and record-keeping purposes. These include such numbers as payroll number, employee number, health plan number, and retirement number.

A1150 *Sex.* Designation as to whether the staff member is male or female.

A1160 *Racial/Ethnic Background.* The racial/ethnic origin of the staff member according to the following five classifications used by the School Reporting Committee, Equal Employment Opportunity Commission: White, Black, Spanish Surnamed, American Indian, Asian American, and other. (Modifications are under study.)

A1170 *Date of Birth.* The month, day, and year of the staff member's birth.

A1180 *Place of Birth.* The local governmental unit (e.g., city, county, township) and State, U.S. Possession, or foreign country in which the staff member was born.

A1200 Military Service Status. The nature of previous and current service of the staff member in the Armed Forces, including type of discharge or separation, date of active service, veteran's privileges, and current military status, if any.

A1210 *Military Service.* The branch (e.g., U.S. Army, U.S. Air Force) of the Armed Forces and the inclusive dates of military service of the staff member.

A1220 *Type of Discharge.* The type of discharge (e.g., honorable, general, dishonorable) that the staff

member was granted upon leaving the Armed Forces.

A1230 *Reserve or National Guard Status.* The current Armed Forces reserve or National Guard status, if any, of the staff member and the date on which this obligation ends.

A1240 *Draft Classification.* The current draft classification (e.g., 4-F, 1-H), if any, issued to the staff member by the Selective Service System.

A1300 Citizenship Status. The nature of the staff member's citizenship status within the United States.

A1310 *U.S. Citizen.* Entry indicating that the staff member is a citizen of the United States whether by birth or by naturalization.

A1311 *U.S. Citizen by Birth.*

A1312 *Naturalized U.S. Citizen.*

A1320 *Citizen of Other Country.* Entry indicating that the staff member is a citizen of a country other than the United States, whether admitted to the United States for permanent residence or admitted as a nonimmigrant visitor.

A1321 *Citizenship Papers Pending.*

A1322 *Exchange Program.*

A1329 *Other.*

A2000 TAX INFORMATION

Data necessary to comply with applicable Federal, State, and local income and wage tax withholding regulations.

A2100 Federal Income Tax. Data necessary to comply with required Federal income tax withholding regulations of the Internal Revenue Service. These data, which are usually completed by the staff member on his W-4 form, include marital status, number of dependents and exemptions, and the amount of any additional withholding.

A2110 *Marital Status.* Entry indicating whether the staff member is currently single or married, based on Internal Revenue Service definitions.

A2111 *Single.* Entry indicating that the staff member is not married. The staff member may have never been married or, having been married, is now widowed or divorced. A staff member who is married but legally separated or whose spouse is a nonresident alien also is considered single.

A2112 *Married.* Entry indicating that the staff member is not single.

A2120 *Dependents.* The number of dependents claimed by the staff member, as defined by the Internal Revenue Service. (See IRS Form W-4.)

A2130 *Number of Exemptions Claimed.* The total number of exemptions and allowances claimed by the staff member for Federal income tax purposes, in accordance with Internal Revenue Service definitions and rules. (See IRS Form W-4.)

A2140 *Amount of Additional Withholding Per Pay Period.* The dollar amount (if any) per pay period of additional withholding from the staff member's paycheck or voucher for Federal income tax purposes. Any such withholding must be made under agreement with the employing agency.

A2200 State Income or Wage Tax. This category can be used in those States having an income or wage tax where the staff member wants to declare tax withholdings or exemptions which differ from those on his Federal W-4 form. The category can be subdivided in the same way as **A2100, Federal Income Tax,** if necessary. However, only those data elements with responses which are different from the entries under A2110 through A2140 should be included. If there is a State income tax and the staff member is declaring the same with-

holdings and exemptions for both Federal and State tax, only the data under A2130 need be completed.

A2300 Other Income or Wage Tax. This category should only be used by those agencies (e.g., counties, municipalities) having an income or wage tax where the staff member wants to declare tax withholdings which differ from those on his Federal W-4 or State form. Where the necessary data are already included in A2100 and A2200, this category is not used. The category can be subdivided in the same way as **A2100, Federal Income Tax**, if necessary. However, only those data elements with responses different from the entries under A2100 or A2200 should be included. Any other required data elements can also be added under this heading.

A3000 RESIDENCE

Data on the addresses and telephone numbers where the staff member may be reached for mailing and contact purposes.

A3100 Addresses. Permanent and temporary places of abode.

A3110 *Current Home Address.* The house number, hotel name and room number, or apartment house name and apartment number; name of the street, subdivision, or RFD number; city; State; and zip code where the staff member currently lives.

A3120 *Permanent Home Address.* The address (see A3110 for necessary detail) which the staff member considers his permanent place of residence, if different from his current home address.

A3130 *Summer or Off-Season Address.* The address (see A3110 for necessary detail) at which the staff member may be reached during the summer or other off-employment season.

A3190 *Other Business Address.* The address (see A3110 for necessary detail) of any other place of business where the staff member is employed (if he is willing to release the information).

A3200 Telephone Numbers. Each telephone number, including area code and extension (if applicable), at which the staff member may be reached.

A3210 *At Current Home Address.*

A3220 *At Permanent Home Address.*

A3230 *At Summer or Off-Season Address.*

A3290 *At Other Business Address.*

A3300 Person(s) To Be Notified in Case of Emergency. The name, address, and telephone number of the person or persons to be notified in case of an emergency involving the staff member. Data concerning a member of the staff member's immediate family (e.g., minister, physician) may be recorded here.

A3310 *Name.*

A3320 *Address.*

A3330 *Telephone Number.*

A4400 Next of Kin (If different from person to be notified in case of emergency). The name, address, and telephone number of the next of kin of the staff member.

A4000 HEALTH

Data concerning the staff member's health, which is to be recorded only to the extent that laws and regulations permit or require health information for purposes such as staff assignment, workmen's compensation, and disability retirement insurance.

A4100 Health Examinations. Data on health examinations and health tests which are required and permitted by law and regulations.

A4110 *Date of Last Health Examination.* The month, day, and year (as indicated by a physician) when the most recent health examination or health test was completed for the staff member for employment purposes.

A4120 *Results of Last Health Examination.* Results of

the staff member's last health examination or health test as disclosed by a physician and required and permitted by law or regulation for employment purposes.

A4130 *Physical Disabilities or Limitations.* Data indicating verified physical disabilities or limitations of the staff member which need to be recognized in making activity assignments.

A4140 *Immunizations.* Data provided by a qualified person describing those immunizations received by the staff member which are required by law or regulation for employment purposes.

A4150 *Personal Injuries.* A description of each injury to the staff member during the official performance of duties; the date, time, and location of each accident; names of any witnesses; the date of filing claims under insurance plans; and any other information as required by local and State regulations.

A4190 *Other Health Data.* Any data concerning the staff member's health which are not provided in the above data elements and which are required by law or regulation for employment purposes.

B.– EDUCATION AND EXPERIENCE

The B series contains data on the staff member's general educational background, qualifications, and experience or employment. The combination of these data categories provides the LEA administrator with the information necessary (1) to assign the staff member to an activity for which he or she is qualified, and (2) to carry out manpower plans and fill future staffing needs.

Education and experience data items, prior to and including the present employer, are classified and defined in the B1000 and B2000 categories respectively.

B1000 EDUCATION AND CREDENTIALS

B1100 **Formal Education.** The formal education completed by the staff member both prior to and during current employment.

B1110 *Highest Year of Education Completed.* The number or descriptive term indicating the highest year of formal education completed by the staff member.

B1120 *Educational Institutions Attended.*

B1121 *Name.* The name or other designation (e.g., school district number) of the elementary school and secondary school last attended by the staff member and of each college, university, technical institute, trade school, school of nursing, or other post-secondary educational institution attended by the staff member.[1]

B1122 *Type.* A description of each type of school (e.g., public school, nonpublic school, technical institute, school of nursing, trade school, college, or university) attended by the staff member.

B1123 *Location.* The city and State in which each educational institution attended by the staff member is located. Where the location is other than the United States, the country should be indicated.

B1124 *Dates of Attendance.* The inclusive dates when the staff member attended each educational institution.

B1130 *Degrees and Certificates Earned.* Data concerning any degrees or certificates earned by the staff member.[2]

[1] For a coding of all higher education institutions in the United States, see the *Education Directory, 1973-74: Higher Education*, published in 1974 by the National Center for Educational Statistics, Office of Education, United States Department of Health, Education and Welfare. (For sale by the Superintendent of Documents, Stock No. 1780-01272, U.S. Government Printing Office, Washington, D.C. 20402. Price $5.30)

[2] For a more detailed explanation of the criteria to be met for undergraduate and graduate degrees, see *Earned Degrees Conferred, 1970-71*, published in 1972 by the National Center for Educational Statistics, Office of Education, United States Department of Health, Education and Welfare. (For sale by the Superintendent of Documents, Catalog No. HE 5.254:54013-70, U.S. Government Printing Office, Washington, D.C. 20402. Price: 50 cents.)

B1131 *Type and Name of Degree.* The type and specific name of each degree or certificate earned by the staff member.

B1131.01 High School Diploma. The staff member has completed the equivalent of 4 years of high school and has been granted a high school diploma.

B1131.02 Technical Certificate. The staff member has completed a post-secondary program of studies at a technical institute or vocational school and has been granted a technical certificate (e.g., a certificate in radio electronics or business administration).

B1131.03 Associate Degree. The staff member has completed the equivalent of 2 years of college, usually at a community/junior college, and has been granted an associate degree (e.g., Associate in Arts, Associate in Education).

B1131.04 Bachelor's Degree. The staff member has completed the equivalent of 4 years of college and has been granted a bachelor's degree (e.g., Bachelor of Arts, Bachelor of Science, Bachelor of Business Administration).

B1131.05 First-Professional Degree. The staff member has earned and been granted a first-professional degree (e.g., Doctor of Medicine, Juris Doctor, Bachelor of Divinity).

B1131.06 Master's Degree. The staff member has earned and been granted a master's degree (e.g., Master of Arts, Master of Social Work, Master of Industrial Arts) or its equivalent, such as the 6-year Educational Specialist degree.

B1131.07 Intermediate Degree. The staff member has earned and been granted an intermediate degree (e.g., Candidate in Philosophy, Master of Philosophy) for work completed beyond the master's degree but has not earned a doctorate.

B1131.08 Doctorate. The staff member has earned and been granted a doctorate (e.g., Doctor of Philosophy, Doctor of Education). An entry for Doctor of Medicine or Juris Doctor would not come under this element; rather, these degrees should be entered under B1131.05, First-Professional Degree. Honorary doctorates should be entered under element B1135.

B1131.09 Other Degree. Any other degree or certificate earned by the staff member which would not be included under the above data elements.

B1132 *Name of Educational Institution at Which Degree Was Earned.* The name of the school, technical institute, college, university, or other educational institution at which the staff member earned each degree or certificate described above.

B1133 *Date Degree Earned.* The month and year in which the staff member earned each degree or certificate.

B1134 *Additional Credit Earned Beyond Degree.* Any additional credit, in semester hours or quarter hours converted (see B1141.01), earned by the staff member beyond his last degree. The subject matter of the course(s) and the year in which the credit was earned should be specified.

B1135 *Academic Awards and Honorary Degrees.* The name of any academic awards or honors (e.g., membership in Phi Beta Kappa, graduation cum laude) or honorary degrees which the staff member has received. The name of each award and honorary degree and the institution granting each degree should be specified.

B1140 *Areas of Specialization in Undergraduate and Graduate Study.* The major, minor, and other areas of specialization completed by the staff member in undergraduate and graduate study.

B1141 *Major.* The descriptive name of each major area of specialization completed by the staff member in undergraduate and graduate study. In the case of professional or administrative certification, each of these areas should be recognized as a "major" by each State in terms of

the applicable State laws and regulations governing certification.*

B1141.01 Number of Semester Hours of Credit. The number of semester hours of credit earned by the staff member in each recognized major. Quarter hours are converted to semester hours on the basis that three quarter hours are equal to two semester hours.

B1142 *Minor.* The descriptive name of each minor area of specialization completed by the staff member in undergraduate and graduate study. In the case of professional or administrative certification, each of these areas of specialization should be recognized as a "minor" by each State in terms of the applicable State laws and regulations governing certification.[3]

B1142.01 Number of Semester Hours of Credit. The number of semester hours (or quarter hours converted–see B1141.01) of credit earned by the staff member in each minor.

B1143 *Any Field or Area of Specialization Other Than Major or Minor.* The descriptive name of each field or area of specific preparation other than the staff member's major or minor. The field or area should be specified.

B1143.01 Number of Semester Hours of Credit Earned. The number of semester hours (or quarter hours converted–see B1141.01) of credit earned by the staff member in each field or area of specialization other than his major or minor.

B1144 *Number of Semester Hours of Professional Education Credit Earned.* The number (if any) of semester hours (or quarter hours converted–see B1141.01) of credit earned by the staff member in recognized undergraduate and graduate professional education courses.

B1145 *Total Number of Semester Hours of Credit Earned.* The total number of semester hours (or quarter hours converted–see B1141.01) of credit earned by the staff member in undergraduate and graduate study.

B1200 **Other Education.** Any study or training program completed by the staff member other than in a regular undergraduate or graduate course or program. Examples would include computer programing and automobile repair courses given by private companies management seminars given by professional organizations, adult education courses, and safety programs taught by civic groups (e.g., the Red Cross). This category encompasses other education both prior to and during current employment.

B1210 *Inservice Education.* Any study or training program sponsored by the staff member's employer and completed during the staff member's period of employment. Inservice education, as defined in this handbook, is a program of systematized activities promoted or directed by the staff member's employer that contributed to the professional or occupational growth and competence of the staff member during his time of service. College courses completed for credit should be entered under B1100.

B1211 *Type of Activity.* The descriptive name (subject matter) of each course, committee service, workshop, or other inservice study or training program completed by the staff member.

B1212 *Institution/Agency Offering Activity.* The name of the institution or company (e.g., a local school system or private firm), the agency (e.g., the State education agency, the county government, or health department), or the organization (e.g., the Red Cross or an employee organization) which offered the inservice education completed by the staff member.

B1213 *Date and Duration of Activity.* The year in which the inservice activity was completed by

*For a uniform coding of fields of study, see *A Taxonomy of Instructional Programs in Higher Education*, published in 1970 by the National Center for Educational Statistics, Office of Education, United States Department of Health, Education and Welfare. (For sale by the Superintendent of Documents, Catalog No. HE 5.250:50064, U.S. Government Printing Office, Washington, D.C. 20402. Price: 45 cents.)

the staff member and the duration of the activity.

B1214 *Award (If Any) Received Upon Completion.* The award (e.g., promotion, additional salary, certificate of completion), if any, given the staff member upon completion of the inservice activity.

B1220 *Other-Than-Inservice Education.* Any study or training program completed by the staff member which was not sponsored by his employer, but which is recognized by the LEA as having significance in staff assignments.

B1221 *Type of Activity.* The descriptive name (subject matter) of each course, committee service, workshop, or other study or training program completed by the staff member, which was not sponsored by his employer.

B1222 *Institution/Agency Sponsoring Activity.* The name of the institution or company (e.g., a local school system or private firm), the agency (e.g., the State education agency, the county government, or health department), or the organization (e.g., the Red Cross or an employee organization) which sponsored the other-than-inservice education completed by the staff member.

B1223 *Date and Duration of Activity.* The year in which the other-than-inservice education was completed by the staff member and the duration of the activity.

B1224 *Award (If Any) Received Upon Completion.* Entry indicating the award (e.g., promotion, additional salary, certificate of completion), if any, given the staff member upon completion of other-than-inservice activity.

B1230 *Internship/Apprenticeship.* Data on any period during which the staff member formally served as an intern or an apprentice (e.g., the inclusive dates of that period, the name and location of the employer, and the occupational area or the internship or apprenticeship). Internship/apprenticeship both prior to and during current employment should be entered here.

B1300 **Credentials.** Data on each active certificate, license, permit, or other credential held by the staff member which are significant in terms of assignment.

B1310 *Teaching Certificate or License.* The legal document giving authorization from the State (or an agency or organization authorized by the State) to perform teaching assignment services for the LEA.

B1311 *Name of Teaching Certificate or License.* The complete title or name, including identification number, of each active teaching certificate held by the staff member.

B1312 *Issuing Agency.* The name of the agency (e.g., State Department of Education) which issued each active teaching certificate held by the staff member.

B1313 *Date of Issuance.* The month, day, and year each active teaching certificate was issued to the staff member.

B1314 *Date of Renewal or Reissuance.* The month, day, and year of renewal of each active teaching certificate, either by reissuance or endorsement by the issuing agency.

B1315 *Date of Expiration.* The month, day, and year when each active teaching certificate held by the staff member will expire. When the certificate is renewed, the expiration date of the new certificate is recorded.

B1316 *Specific Function Authorized.* Each functional area within which the staff member is authorized to serve by each active teaching certificate held.

B1317 *Instructional Level(s) Authorized.* The instructional level or levels (e.g., elementary school, middle/junior high school, high school) within which the staff member is authorized to serve by each active teaching certificate held.

B1318 *Contact Group Specified.* The grade or range of grades within which the staff member is authorized to serve by each active teaching certificate held.

B.–EDUCATION AND EXPERIENCE (Continued)

B1319 *Teaching Fields or Areas Authorized.* The descriptive name of each teaching field within which the staff member is authorized to teach by each active teaching certificate held. The names of the fields should be in accordance with local and State practice and terminology. In a departmentalized organization, a teaching field is a major subdivision of the educational program such as language arts, mathematics, music, distributive education, and physical education. (See the E Series, Subject Matter Area.) In a nondepartmentalized situation or in a self-contained classroom, a general teaching level such as elementary or secondary may be the most accurate designation of a teaching field.

B1321 *Course(s), Subject(s), or Activity(ies) Authorized.* The descriptive name or title of each course, subject, or activity the staff member is authorized to teach by each active teaching certificate held. The descriptive names or titles should be in accordance with local and State practice and terminology and should be consistent with the names and titles in the E series, Subject Matter Area, and with OE Handbook VI.

B1330 *Other Certificate or License.* Any document, other than a teaching certificate, issued to a staff member by the State or other agency or association authorizing the holder to perform services for the LEA. These documents would include both certificates to perform professional support services (e.g., librarian and dietitian certification as well as principal and superintendent certification) and licenses to perform nonprofessional support services (e.g., permits for electricians and special driver's licenses for bus drivers). Staff members holding more than one active certificate or license should provide data on each credential; those staff members holding both a teaching certificate and another certificate (e.g., principals) should have entries under B1310 and B1330.

B1331 *Name of Certificate or License.* The complete title or name, including identification number, of each active certificate or license held by the staff member.

B1332 *Issuing Agency.* The name of the agency (e.g., State department of health, State education agency) which issued each active certificate or license held by the staff member.

B1333 *Date of Issuance.* The month, day, and year each active certificate or license was issued to the staff member.

B1334 *Date of Renewal or Reissuance.* The month, day, and year of renewal of each active certificate or license held, whether by reissuance or endorsement by the issuing agency.

B1335 *Date of Expiration.* The month, day, and year when each active certificate or license held by the staff member will expire. When the certificate or license is renewed, the new expiration date is recorded.

B1336 *Specific Function Authorized.* Each functional area (other than teaching) within which the staff member is authorized to serve by each active certificate or license held. (See categories D2000 through D3000.) The descriptive name should be in accordance with local and State practice and terminology.

B2000 EXPERIENCE

Data on the work experience of the staff member prior to and including employment with the LEA.

B2100 **Prior Education-Related Experience.** Data about the staff member's employment with other LEA's or educational institutions prior to current employment.

B2110 *Dates of Each Employment.* Inclusive dates of employment by each LEA, State education agency, or individual educational institution prior to current employment.

B2120 *Previous Employing Agency.* For each prior education-related employment, the name of the LEA or other educational institution, the

address, and the type of educational institution (see elements B1122 for examples).

B2121 *Name.*

B2122 *Address.*

B2123 *Type of Educational Institution.*

B2130 *Nature of Assignment.* For each prior education-related employment, the descriptive name (e.g., teaching, office/clerical, custodial) of the assignment performed by the staff member. (See the activity assignments in the C series.) If the assignment was professional educational, data on the instructional level and teaching field should be recorded, if applicable.

B2140 *Total Number of Years of Prior Education-Related Experience.* A cumulative total expressed in years (e.g., 3 years, 2.5 years) of employment with an educational institution.

B2141 *Years of Public Education Experience.* Total number of years of employment with public educational institutions.

B2142 *Years of Nonpublic Education Experience.* Total number of years of employment with nonpublic educational institutions.

B2200 **Prior Noneducation Experience.** Data about the staff member's prior employment in work not associated with an educational institution.

B2210 *Dates of Each Employment.* The inclusive dates of each of the staff member's noneducation employment periods prior to current employment.

B2220 *Previous Employer(s).* For each prior noneducation employment, the name of the employer (e.g., company, firm, or individual), the address, and the nature of the employer's business.

B2221 *Name.*

B2222 *Address.*

B2223 *Nature of Business.*

B2230 *Nature of Assignment.* For each prior noneducation employment, the descriptive name (e.g., secretary, engineer, plumber) of the assignment performed by the staff member.

B2240 *Total Number of Years of Prior Noneducation Experience.* A cumulative total expressed in years (e.g., 3 years, 6.5 years) of prior noneducation employment.

B2300 **Experience with Present Employer (other than current assignment).** Data on the work experience of the staff member with the present employer (exclusive of the current assignment).

B2310 *Dates of Each Assignment.* Inclusive dates of each assignment with the current employer.

B2320 *Nature of Each Assignment.* For each prior assignment, the descriptive name of the assignment performed by the staff member (e.g., teaching, teaching aide, vehicle operating).

B2330 *Years of Experience with Present Employer.* The number of years, or fraction of a year, of each assignment and a cumulative total of years of employment with the present employer.

B3000 **RELATED EXPERIENCE**

Data on any other relevant experience of the staff member which the LEA regards as significant.

B3100 **Travel.** The nature and dates of travel by the staff member to other countries or other parts of the United States when such travel is significant to the staff member's job requirements and qualifications.

B3200 **Special Avocational Interests and Skills.** Description of any hobbies or other avocational interests or skills of the staff member which may enhance the quality of performance of his or her job. Singing, art, music, writing, public speaking, and youth work are examples of interests and skills which may be included in this element.

B3300 **Other Areas of Informal Qualification.** Any

other areas or fields in which the staff member has some special informal qualification or occupational training (e.g., as a journeyman electrician).

B3400 Empathy with Special Contact Groups. Notation of the staff member's interest and ability to work with any special contact groups, based on such factors as bilingualism, racial or ethnic background, or religion. If necessary, this element may be further subdivided into languages spoken or other subelements at the discretion of the local administrator.

B3500 Organizational Memberships. Data concerning the organizations and/or associations to which the staff member has belonged.

B3510 *Work-Related Organizations.* Those organizations and associations which are in some way related to the staff member's work (e.g., professional associations, employee unions, organizations sponsored by the LEA).

B3511 *Name of Organization.* The name of each work-related organization or association to which the staff member belongs.

B3512 *Date of Membership.* The month and year in which the staff member joined the work-related organization.

B3513 *Offices Held.* The title of any position of trust and leadership held by the staff member in the work-related organization to which he belongs.

B3514 *Dates Offices Held.* The years and terms of office of any leadership position held by the staff member in a work-related organization.

B3520 *Honorary, Cultural, and Civic Organizations.* Those organizations which serve some honorary, cultural, or civic purpose. This category would include community action groups, youth groups such as the Boy Scouts and Girl Scouts, and municipal and local government councils to which the staff member may have been elected or appointed.

B3521 *Name of Organization.* The name of each honorary, cultural, or civic organization to which the staff member belongs.

B3522 *Date of Membership.* The month and year in which the staff member joined each honorary, cultural, or civic organization.

B3523 *Offices Held.* The title of any position of trust and leadership held by the staff member in the honorary, cultural, or civic organizations to which he or she belongs.

B3524 *Dates Offices Held.* The years and terms of office of any leadership position held by the staff member in an honorary, cultural, or civic organization.

C.—JOB CLASSIFICATION AND ACTIVITY ASSIGNMENT

This series groups into general categories the kinds of work staff members perform within the LEA and divides these categories (or classifications) into activity assignments describing the major activities of each position. The job classifications, which are based upon the job categories defined and used by the Equal Employment Opportunity Commission, the Bureau of the Census, and the U.S. Department of Labor, are intended to identify the major skill levels needed in an LEA and to provide structure for LEA analysis, decisionmaking, and reporting to State and Federal agencies. Each general category may be subdivided by the local administrator into as many assignments as necessary, depending upon the size of the LEA and its own internal reporting needs.

The assignments identify the staff member by what he or she does rather than by his or her job title, education, or experience. A staff member with a Doctor of Philosophy degree who is working as a programer or teaching assistant would be classified under C4008 or C4012 respectively, even though these assignments are designated as "Technical." However, a staff member who performs as a business manager would be placed under the "Supervising/Managing/Directing" assignment (C1010) in the "Official/Administrative" classification, even if he or she has less than a high school diploma and no prior business experience.

If a staff member has more than one activity assignment, the full-time equivalency of *each* assignment should be recorded. (See chapter 6, page 88.)

C1000 OFFICIAL/ADMINISTRATIVE

A grouping of assignments comprising the various skill levels required to perform manage-

ment activities, such as developing broad policies for the LEA and executing these policies through direction of staff members at all LEA levels. Those activities performed directly for policymakers are also included here. The "Official/Administrative" classification does not preclude "Professional–Educational" or "Professional–Other" status.

Under the "Official/Administrative" classification, the following activity assignments are the most common in the LEA; the list may be expanded as necessary at the discretion of the local administrator.

C1001 Administrative Assistant Assignment. An assignment to perform activities assisting an executive officer in performing his assigned activities in the LEA.

C1002 Administrative Intern Assignment. An assignment to perform activities as part of an internship plan involving supervision and periodic evaluation of the employee.

C1003 Assistant/Deputy/Associate Superintendent Assignment. An assignment to a staff member (e.g., an assistant, deputy, or associate superintendent) to perform high-level, systemwide, executive management functions in an LEA.

C1004 Assistant Principal Assignment. An assignment to a staff member (e.g., an assistant, deputy, or associate principal) to perform high-level executive management functions in an individual school, group of schools, or units of an LEA.

C1005 Board of Education Member Assignment. An assignment to perform activities as a member of a legally constituted body which has been created and vested with responsibilities for educational activities in a given geographical area.

C1006 Foreman Assignment. An assignment, considered to be a function of management, to supervise the day-to-day operations of a group of skilled, semiskilled, or unskilled workers (e.g., warehouse or garage workers).

C1007 Ombudsman Assignment. An assignment to receive and investigate complaints made by individuals against alleged abuses resulting from capricious acts by LEA administrative officials. (The ombudsman usually works for the board of education in a quasi-official status.)

C1008 Principal Assignment. An assignment to perform the highest level executive management functions in an individual school, a group of schools, or units of an LEA.

C1009 Superintendent Assignment. An assignment to a staff member (e.g., chief executive of schools or chancellor) to perform the highest level, systemwide, executive management functions of an LEA.

C1010 Supervising / Managing / Directing Assignment. An assignment to direct staff members and manage a function, a program, or a supporting service. As with all activity assignments, the scope of this assignment is identified in F1100. Examples of staff members having this assignment include chairmen of academic departments, supervisors of purchasing, directors of physical plant maintenance, business managers, cafeteria directors, and managers of psychological services. (This includes curriculum supervisors who manage staff members.)

C1011 Tax Assessing/Collecting Assignment. An assignment to provide services in the assessment of real and personal property for tax computation purposes and in the collection of taxes for the LEA.

C2000 PROFESSIONAL–EDUCATIONAL

A grouping of assignments requiring a high degree of knowledge and skills acquired through at least a baccalaureate degree (or its equivalent obtained through special study and/or experience), including skills in the field of education or educational psychology.

Under the "Professional–Educational" classification, the following activity assignments are the most common in the LEA; the list may be expanded as necessary at the discretion of the local administrator.

C.—JOB CLASSIFICATION AND ACTIVITY ASSIGNMENT (Continued)

C2001 Curriculum Specialist Assignment. An assignment to a staff member who has expertise in a specialized field to provide information and guidance to other staff members to improve the curriculum of an LEA. This assignment would include the curriculum consultant and curriculum supervisor.

C2002 Counseling Assignment. An assignment to perform the activities of assisting pupils and assisting parents and teachers to assist pupils in making personal plans and decisions in relation to education, career, or personal development.

C2003 Librarian/Media Assignment. An assignment to develop plans for and manage the use of teaching and learning resources, including equipment, content material, and services.

C2004 Remedial Specialist Assignment. An assignment to perform activities concerned with correcting or improving specific marked deficiencies (such as a deficiency in content previously taught but not learned) which are not due to impairment of mental or physical ability.

C2005 Teaching Assignment. An assignment to instruct pupils/students.

C3000 PROFESSIONAL—OTHER

A grouping of assignments requiring a high degree of knowledge and skills acquired through at least a baccalaureate degree (or its equivalent obtained through special study and/or experience), but not requiring skills in the field of education.

Under the "Professional—Other" classification, the following activity assignments are the most common in the LEA; the list may be expanded as necessary at the discretion of the local administrator.

C3001 Accounting Assignment. An assignment to design and maintain financial, staff, pupil, program, or property records; to summarize, analyze, or verify such records; and/or to control and certify expenditures and receipts.

C3002 Analyst Assignment. An assignment to examine, evaluate, and make recommendations in such areas as cost, systems, curriculum, or other educational sectors. Examples of staff members having this assignment include systems analysts, budget analysts, statistical analysts, and psychological analysts.

C3003 Architect Assignment. An assignment to a staff member who is licensed as an architect to perform activities such as designing and preparing plans and specifications for the construction, remodeling, or repair of buildings and facilities and overseeing construction to ensure compliance with plans and specifications.

C3004 Audiologist Assignment. An assignment to provide services such as diagnostic evaluation, habilitative and rehabilitative services, and research related to hearing.

C3005 Auditing Assignment. An assignment to perform activites concerned with examining, verifying, and reporting on the accounting records of the LEA.

C3006 Dentist Assignment. An assignement to a staff member who is licensed as a dentist to diagnose and treat diseases, injuries, and malformations of the teeth and gums.

C3007 Dietitian/Nutritionist Assignment. An assignment to plan and direct food services programs, including determining the nutritional value of food for meals.

C3008 Editing Assignment. An assignment to select, write, and review materials for publication.

C3009 Engineer Assignment. An assignment to a staff member who is licensed as an engineer to perform activities such as designing and preparing plans and specifications for sites, building structures, and service systems, and supervising their development, construction, operation, maintenance, and improvement.

C3010 Evaluating Assignment. An assignment to determine the value or effect of plans, programs, and activities by appraisal of data and activities in light of specified goals and objectives.

C3011 Legal Assignment. An assignment to a staff member qualified to practice law to perform such activies as conducting lawsuits, drawing up legal documents, and advising the LEA on legal rights.

C3012 Negotiating Assignment. An assignment to

perform such activities as resolving labor/management problems and helping to settle disputes and effect compromises. This assignment would include representatives of *either* management or labor (e.g., shop stewards).

C3013 Opthalmologist Assignment. An assignment to a staff member who is licensed as a physician and certified as an opthalmologist to provide specialized services in the care of the eye and its related structures.

C3014 Optometrist Assignment. An assignment to a staff member who is a licensed optometrist to treat optical and muscle defects of the eye without the use of drugs or surgery.

C3015 Personnel Assignment. An assignment to perform activities concerned with staff recruitment, selection, training, and assignment; maintaining staff records; and working with administrators in developing pension and insurance plans.

C3016 Physician Assignment. An assignment to a staff member who is licensed as a medical doctor to diagnose and treat diseases and disorders of the human body.

C3017 Planning Assignment. An assignment to perform activities concerned with selecting or identifying the goals. priorities, and objectives of the LEA and formulating the courses of action to fulfill these objectives.

C3018 Psychiatrist Assignment. An assignment to a staff member who is licensed as a physician and certified as a psychiatrist to study, diagnose, and treat diseases and disorders of the mind.

C3019 Psychologist Assignment. An assignment to a staff member who is licensed as a psychologist to evaluate and analyze pupils' behavior by measuring and interpreting their intellectual, emotional, and social development, and diagnosing their educational and personal disabilities.

C3020 Public/Community Relations Assignment. An assignment to foster good relations between the LEA and the public as a whole, by planning and conducting programs to disseminate information through such media as newspapers, radio and television, public forums, and civic activities, and by reviewing material for and directing preparation of LEA publications.

C3021 Registered Nursing Assignment. An assignment to a staff member who is licensed as a registered nurse to perform activities requiring substantial specialized judgment and skill in the observation, care, and counsel of ill and injured persons, and in illness prevention.

C3022 Registrar Assignment. An assignment to coordinate and direct LEA registration activities, including compilation and analysis of registration data for administrative use.

C3023 Research and Development Assignment. An assignment to perform activities concerned with systematic study and investigation using the products of research and judgment to improve educational programs.

C3024 Social Work Assignment. An assignment to assist in the prevention of, or solution to, those personal, social, and emotional problems of individuals which involve such relationships as those of the family, school, and community.

C3025 Statistician Assignment. An assignment to plan surveys and collect, summarize, and interpret numerical data, applying statistical theory and methods to provide usable information.

C3026 Therapist Assignment. An assignment to perform activities involving occupational or physical methods of treatment and rehabilitation without the use of drugs or surgery.

C4000 TECHNICAL

A grouping of assignments requiring a combination of basic scientific knowledge and manual skills which can be obtained through approximately 2 years of post-high school education, such as is offered in community/junior colleges and technical institutes, or through equivalent special study and/or on-the-job training.

Under the "Technical" classification, the following activity assignments are the most common in the LEA; the list may be expanded as necessary at the discretion of the local administrator.

C4001 Assistant Counseling Assignment. An assignment, under the supervision or direction of a counselor, to perform the activities of assisting pupils, as well as parents and teachers or other staff who advise pupils, to help them in making plans and decisions in relation to education, career, or personal development.

C4001 Audiometrist Assignment. An assignment to administer audiometric (hearing acuity) screening tests under the supervision of an audiologist or physician.

C4003 Computer Operating Assignment. An assignment to operate and control computers and related peripheral equipment.

C4005 Dental Hygienist Assignment. An assignment to a staff member who is licensed as a dental hygienist to perform dental prophylactic treatments and to instruct others in the care of teeth and mouth.

C4006 Graphic Arts Assignment. An assignment to plan and arrange art layouts to illustrate programs or processes for publication, demonstration, and more effective communication.

C4006 Inspector Assignment. An assignment to approve the condition of equipment and buildings as they relate to safety and health, and the condition of new construction as it relates to specifications and codes.

C4007 Practical Nursing Assignment. An assignment to perform auxiliary medical services, such as taking and recording temperature, pulse, and respiration rate, and giving medication under the supervision of a physician or a registered nurse.

C4008 Programing Assistant. An assignment to prepare logical coded sequences of operations to be performed by a computer in solving problems or processing data.

C4009 Psychometrist Assignment. An assignment to perform activities concerned with measuring the intellectual, social, and emotional development of pupils through the administration and interpretation of psychological tests. These activities are usually carried out under the direction or supervision of a psychologist or related professional.

C4010 Purchasing Agent Assignment. An assignment to perform activities concerned with buying supplies, equipment, and materials used in the operation of the LEA.

C4011 Student-Teaching Assignment. An assignment to instruct pupils under the supervision of a certificated teacher as part of a formalized higher education program of teacher preparation.

C4012 Teaching Assistant Assignment. An assignment to perform the day-to-day activities of teaching pupils under the supervision of a teacher. The teaching assistant assignment does not include diagnostic or long-range evaluative decisions regarding pupils taught. Staff members having this assignment may or may not be certificated but have completed at least 2 years of formal education preparatory for teaching or the equivalent in experience or training.

C4013 Teaching Intern Assignment. An assignment to instruct pupils held by a person who has not fulfilled all the requirements for a professional in the teaching field. This person usually has a professional level of competence in a field other than education and is allowed to teach while obtaining the necessary knowledge and skills in education and/or educational psychology.

C5000 OFFICE/CLERICAL

A grouping of assignments to perform the activities of preparing, transferring, transcribing, systematizing, or preserving communications, records, and transactions, regardless of the level of skills required, where the activities are predominantly nonmanual.

Under the "Office/Clerical" classification, the following activity assignments are the most common in the LEA; the list may be expanded as necessary at the discretion of the local administrator.

C5001 Bookkeeping Assignment. An assignment to keep a systematic record of accounts or transactions and to prepare statements.

C5002 Clerical Assignment. An assignment to perform activities concerned with preparing, transferring, transcribing, systematizing, or filing written communications and records. This assignment includes the positions of clerk, clerk-typist, stenographer, file clerk, and secretary.

C5003 Messenger Assignment. An assignment to deliver messages, documents, packages, and other items to offices or departments within or outside the LEA.

C5004 Records Managing Assignment. An assignment to perform activities concerned with establishing and maintaining an adequate and efficient system for controlling the records of the LEA.

C5005 Teaching Aide Assignment. An assignment to assist a teacher with routine activities associated with teaching (i.e., those activities requiring minor decisions regarding students, such as monitoring, conducting rote exercises, operating equipment, and clerking).

C6000 CRAFTS AND TRADES

A grouping of manual assignments requiring a relatively high skill level (usually acquired through an extensive period of training) as well as requiring considerable judgment and a thorough and comprehensive knowledge of the processes involved in the work.

Under the "Crafts and Trades" classification, the following activity assignments are the most common in the LEA; the list may be expanded as necessary at the discretion of the local administrator.

C6001 Carpentering Assignment. An assignment to perform activities involved in constructing, erecting, installing, and repairing wooden structures and fixtures.

C6002 Electrician Assignment. An assignment to perform activities involved with planning layout, installing, and repairing wiring, electrical fixtures, apparatus, and control equipment.

C6003 General Maintenance Assignment. An assignment to perform activities concerned with repair and upkeep of buildings, machinery, and electrical and mechanical equipment.

C6004 Masoning Assignment. An assignment to perform activities involved with working with stone, brick, concrete, artificial stone, and the like in constructing, erecting, and repairing structures and fixtures.

C6005 Mechanic Assignment. An assignment to perform activities involved with inspecting, repairing, and maintaining functional parts of mechanical equipment and machinery.

C6006 Painting Assignment. An assignment to perform activities involved with painting, varnishing, and staining the interior and exterior of buildings and fixtures.

C6007 Plastering Assignment. An assignment to perform activities involved with applying and repairing plaster in the interior and on the exterior of buildings.

C6008 Plumbing Assignment. An assignment to perform activities involved with assembling, installing, and repairing pipes, fittings, and fixtures of heating, water, and drainage systems.

C7000 OPERATIVE

A grouping of manual assignments requiring an intermediate skill level (which can be mastered in a few weeks through limited training) necessary to perform machine operating activities.

Under the "Operative" classification, the following activity assignments are the most common in the LEA; the list may be expanded as

necessary at the discretion of the local administrator.

C7001 Crafts and Trades Apprenticeship Assignment. An assignment to perform the activities of an apprentice in crafts and trades (see C6000).

C7002 Dispatching Assignment. An assignment to assign vehicles and drivers to perform specific services and to record such information concerning vehicle movement as the LEA may require.

C7003 Vehicle Operating Assignment. An assignment consisting primarily of driving a vehicle such as a bus, truck, or automobile used in the service of the LEA.

C8000 LABORER

A grouping of manual assignments which generally require no special training. All laborers performing lifting, digging, mixing, loading, and pulling operations would be classified in this general job classification. Under the "Laborer" classification, the one fairly common specific activity assignment associated with an LEA is groundskeeping; other activity assignments may be added by the local administrator if needed by a particular LEA.

C8001 Groundskeeping Assignment. An assignment to maintain grounds owned, rented, or leased, and used by the LEA. This assignment does not include the operation of machinery requiring semiskilled training or experience.

C9000 SERVICE WORK

A grouping of assignments, regardless of level of difficulty, which relate to both protective and nonprotective supportive services. Under the "Service Work" classification, the following activity assignments are the most common in the LEA; the list may be expanded as necessary at the discretion of the local administrator.

C9001 Attendance Officer Assignment. An assignment to enforce compulsory attendance laws.

C9002 Custodian Assignment. An assignment to perform LEA plant housekeeping and servicing activities consisting of cleaning; operating heating, ventilating, and air-conditioning systems; and servicing building equipment.

C9003 Elevator Operating Assignment. An assignment to transport passengers and freight between the floors of a building via elevator.

C9004 Food Service Assignment. An assignment to perform the activities of preparing and serving food.

C9005 Guard/Watchman Assignment. An assignment to perform activities concerned with maintaining the safety and security of LEA property, facilities, and personnel.

C9006 Monitoring Assignment. An assignment to perform such activities as helping to keep order on buses, playgrounds, and in lunchrooms, and taking attendance. This assignment would include traffic guards for loading buses.

C9007 Stores Handling Assignment. An assignment to perform the activities of receiving, storing, and dispensing school supplies, materials, and equipment.

D.—FUNCTION AND PROGRAM ASSIGNMENT

The D series provides data on the nature of the function and program or support service to which the staff member is assigned. (If a staff member is assigned to more than one function and program area, the full-time equivalency of assignment to each area should be recorded). Function, or purpose which the staff member serves, includes activities or actions performed to accomplish the objectives of the LEA.

The four main functions of the LEA—instruction, supporting services, community services, and debt services—are divided into subfunctions. Subfunctions are divided into programs (service areas) which are further divided into subprograms (areas of responsibility). Each of the subfunctions, service areas, and areas of responsibility consist of activities which have somewhat the same general operational objectives. Furthermore, categories of activities comprising each

of these areas are grouped according to the principle that the activities should be combinable, comparable, relatable, and yet mutually exclusive. The following illustration is given to clarify the logical arrangement:

FUNCTION
1000 Instruction 2000 Supporting Services

SUBFUNCTION
1100 Regular Programs 2100 Support Services–Pupils

SERVICE AREA
1110 Elementary Programs 2110 Attendance and Social Work Services

AREA OF RESPONSIBILITY
1111 Program #1 Johnson Elementary School 2111 Service Area Direction

The handbook is not intended to dictate how LEA administrative functions should be arranged into an organizational structure. However, the handbook does identify and define the data elements which can be arranged into any organizational structure according to the needs and objectives of the LEA.

It should be noted that the listing of data elements in this series corresponds exactly to the function dimension in Handbook II, thus providing one of the most important data linkages in the State Educational Records and Reports series.

D1000 INSTRUCTION

Activities dealing directly with the teaching of pupils or with the interaction between teacher and pupils. Teaching may be provided for pupils in a school classroom, in another location such as in a home or hospital, and in other learning situations such as those involving cocurricular activities. It may also be provided through some other approved medium such as television, radio, telephone, or correspondence. Included here are the services of aides or any other type assistance (clerks, markers, teaching machines, etc.) in the instructional process.

D1100 **Regular Programs.** Instructional activities designed primarily to prepare pupils for activities as citizens, family members, and workers, as contrasted with programs designed to improve or overcome physical, mental, social, and/or emotional handicaps. Regular programs include "Elementary Programs," "Middle/Junior High Programs," "High School Programs," and "Other Regular Programs."

D1110 *Elementary Programs.* Learning experiences concerned wih the knowledge, skills, appreciations, attitudes, and behavioral characteristics which are considered to be needed by all pupils in terms of their awareness of life within our culture and the world of work. These experiences normally may be achieved during the elementary school years.

D1120 *Middle/Junior High Programs.* Learning experiences concerned with the knowledge, skills, appreciations, attitudes, and behavioral characteristics which are considered to be needed by all pupils in terms of understanding themselves and their relationships with society and various career clusters. These experiences normally may be achieved during the middle and/or junior high school years (as defined by applicable State laws and regulations).

D1130 *High School Programs.* Learning experiences concerned with the knowledge, skills, appreciations, attitudes, and behavioral characteristics which are considered to be needed by all pupils in terms of understanding themselves and their relationships with society and various occupations and/or professions. These experiences normally may be achieved during the high school years.

D1131 *Preparatory, Postsecondary Education Programs.* Learning experiences concerned with the knowledge, skills, appreciations, attitudes, and behavioral characteristics which are considered to be needed by those pupils desiring further education in postsecondary education programs. These experiences normally may be achieved during the secondary school years.

D1132 *Preparatory, Postsecondary Employment Programs.* Learning experiences concerned with the knowledge, skills, appreciations, attitudes, and behavioral characteristics which are considered to be needed by those pupils desiring immediate postsecondary employment. These experiences normally may be achieved during the secondary school years.

D1139 *Other High School Programs.* Any high school programs which cannot be classified above.

D1190 *Other Regular Programs.* Any regular programs which cannot be classified above.

D1200 Special Programs. Instructional activities designed primarily to deal with pupils having special needs. The "Special Program" subfunction includes preprimary, elementary, and secondary services for the (1) gifted and talented, (2) mentally retarded, (3) physically handicapped, (4) emotionally disturbed, (5) culturally different, (6) pupils with learning disabilities, and (7) for other types of pupils requiring special programs.

D1210 *Programs for the Gifted and Talented.* Special learning experiences for pupils identified as being mentally gifted or talented in areas such as the following: general academic, fine arts, and vocational and technical.

D1220 *Programs for the Mentally Retarded.* Special learning experiences for pupils identified as being mentally retarded according to degree of retardation. Pupils in this category are classified educationally as educable mentally retarded, trainable mentally retarded, and severely mentally retarded.

D1230 *Programs for the Physically Handicapped.* Special learning experiences for pupils identified as having one or more physical handicaps; e.g., blindness, deafness, speech impairment, and lameness.

D1240 *Programs for the Emotionally Disturbed.* Special learning experiences for pupils identified as having emotional problems that require special services.

D1250 *Programs for the Culturally Different.* Special learning experiences for pupils whose backgrounds are so different from those of most pupils that they have been identified as needing additional educational opportunities beyond those provided in the usual school program. Examples of such programs are bilingual education, migrant education, and compensatory education programs.

D1260 *Programs for Pupils With Learning Disabilities.* Special learning experiences for pupils identified as having deficiencies in one or more aspects of the cognitive process and as being underachievers in relation to their overall abilities.

D1290 *Other Special Programs.* Other special learning experiences, such as those for dropouts and delinquents, which cannot be classified above.

D1300 Adult/Continuing Education Programs. Learning experiences designed to develop knowledge and skills to meet both the immediate and long-range educational objectives of adults who, having completed or interrupted formal schooling, have accepted adult roles and responsibilities. Programs include activities to foster the development of fundamental tools of learning, to prepare students for a post-secondary career, to prepare students for post-secondary education programs, to upgrade occupational competencies, to prepare students for a new or different career, to develop skills and appreciations for special interests, or to enrich the aesthetic qualities of life.

D1310 *Adult Basic Education Programs.* Learning experiences concerned with providing the fundamental tools of learning to adults who have never attended school or who have interrupted formal schooling and need this knowledge and these skills to raise their level of education, to increase self confidence and or self determination, to prepare for an occupation, and to function more responsibly as citizens in a democracy.

D1320 *Advanced Adult Education Programs.* Learning experiences designed to develop the knowledge, skills, appreciations, attitudes, and behavioral characteristics considered to be needed by adults who, having completed or interrupted formal schooling, have accepted adult roles and responsibilities and are preparing for postsecondary careers and/or post-secondary education programs.

D1330 *Occupational Programs.* Learning experiences concerned with the skills and knowledge required to prepare learners for immediate employment in an occupation or cluster of occupations. (This type of program is the same as that for secondary or junior college students but differs in that adults are the students served.)

D1340 *Upgrading in Current Occupation Programs.* Learning experiences concerned with skills and knowledge designed primarily to extend or update workers' competencies for occupations in which they are directly employed.

D1350 *Retraining for New Occupation Programs.* Learning experiences concerned with the skills and knowledge required for preparation for employment in a new and different occupation.

1360 *Special Interest Programs.* Learning experiences concerned with the skills and knowledge required to prepare adults for a subordinate occupation in addition to their vocation. Such programs also may be called avocational programs.

D1370 *Life Enrichment Programs.* Learning experiences concerned with skills and knowledge designed primarily for enjoyment, without regard to a vocation.

D1390 *Other Adult/Continuing Education Programs.* Other adult/continuing education programs which cannot be classified above.

D2000 SUPPORTING SERVICES

Services which provide administrative, technical, personal (such as guidance and health), and logistical support to facilitate and enhance instruction and, to a lesser degree, community services.

D2100 Support Services—Pupils. Activities which are designed to assess and improve the well-being of pupils and to supplement the teaching process.

D2110 *Attendance and Social Work Services.* Activities which are designed to improve pupil attendance at school or which attempt to prevent or solve pupil problems involving the home, the school, and the community.

D2111 *Service Area Direction.* Activities associated with directing and managing attendance and social work services.

D2112 *Attendance Services.* Activities such as prompt identification of patterns of nonattendance, promotion of positive attitudes toward attendance, analysis of causes of nonattendance, early action on problems of nonattendance, and enforcement of compulsory attendance laws.

D2113 *Social Work Services.* Activities such as investigating and diagnosing pupil problems arising from the home, school, or community; casework and group work services for pupils and families; interpreting the problems of pupils for other staff members; and promoting change in the circumstances surrounding the individual pupil which are related to his problem.

D2114 *Pupil Accounting Services.* Activities concerned with accumulation and maintenance of records on school attendance, location of home, family characteristics, and other census data. Portions of these records become part of the cumulative record which is maintained for the purposes of counseling and guidance.

D2119 *Other Attendance and Social Work Services.* Other attendance and social work services which cannot be classified above.

D2120 *Guidance Services.* Activities concerned with counseling pupils and parents, providing consultation with other staff members on learning problems, assisting pupils in personal and social development, assessing the abilities of pupils, assisting them as they make their own educational and career plans and choices, providing referral assistance, and working with other staff members in planning and conducting guidance programs for pupils.

D2121 *Service Area Direction.* Activities associated with directing and managing guidance services.

D.–FUNCTION AND PROGRAM ASSIGNMENT (Continued)

D2122 *Counseling Services.* Activities concerned with the relationship between pupils and pupils, counselors and pupils as counselees, and between counselors and other staff members and parents for the purpose of assisting pupils to understand their educational, personal, and occupational strengths and limitations, to relate their abilities, emotions, and aptitudes to educational and career opportunities, to utilize their abilities in formulating realistic plans, and to achieve satisfying personal and social development.

D2123 *Pupil Appraisal Services.* Activities having as their purpose the assessment of pupil characteristics for administrative and instructional purposes and for guidance in assisting the pupil in assessing goals and progress in personality and career development. Test records and materials used for pupil appraisal are usually included in each pupil's cumulative record.

D2124 *Information Services.* Activities organized for the dissemination of educational, occupational, and personal/social information to help acquaint pupils with the curriculum and with educational and vocational opportunities and requirements. Such information might be provided directly to pupils through group or individual guidance, or indirectly through staff members or parents.

D2125 *Records Maintenance Services.* Activities organized for the compilation, maintenance, and interpretation of cumulative records of individual pupils, including systematic consideration of factors such as:

- Home and family background
- Physical and medical status
- Standardized test results
- Personal and social development
- School performance

D2126 *Placement Services.* Activities organized (1) to help place pupils in appropriate educational situations and/or in appropriate part-time employment while they are in school, and in appropriate educational and occupational situations after they leave school; and (2) to help pupils in making the transition from one educational experience to another. The latter may include, for example, admissions counseling, referral services, assistance with records, and followup communications with employers.

D2129 *Other Guidance Services.* Other guidance services which cannot be classified above.

D2130 *Health Services.* Physical and mental health services which do not involve direct instruction. Included are activities involved with providing pupils with appropriate medical, dental, and nursing services.

D2131 *Service Area Direction.* Activities associated with directing and managing health services.

D2132 *Medical Services.* Activities concerned with the physical and mental health of pupils, such as health appraisal, including screening for vision, communicable diseases, and hearing deficiencies; screening for psychiatric services; periodic health examinations; emergency injury and illness care; and communications with parents and medical officials.

D2133 *Dental Services.* Activities associated with dental screening, dental care, and orthodontic activities.

D2134 *Nursing Services.* Noninstructional nursing activities, such as health inspection, treatment of minor injuries, and referrals for other health services.

D2139 *Other Health Services.* Other health services which cannot be classified above.

D2140 *Psychological Services.* Activities concerned with administering psychological tests and interpreting the results, gathering and interpreting information about pupil behavior, working with other staff members in planning school programs to meet the special needs of pupils as indicated by psychological tests and behavioral evaluations, and planning and managing a program of psychological services, including psychological counseling for the school or local education agency.

D2141 *Service Area Direction.* Activities associated with directing and managing psychological services.

D2142 *Psychological Testing Services.* Activities concerned with administering psychological tests, standardized tests, and inventory assessments of ability, aptitude, achievement, interests, and personality, and the interpretation of these measures for pupils, school personnel, and parents.

D2143 *Psychological Counseling Services.* Activities which take place between a school psychologist, counselor, or other staff member and one or more pupils as counselees and their parents, in which the pupils are helped to perceive, clarify, solve, and resolve problems of adjustment and interpersonal relationships.

D2144 *Psychotherapy Services.* Activities which provide a therapeutic relationship between a qualified mental health professional and one or more pupils, in which the pupils are helped to perceive, clarify, solve, and resolve emotional problems or disorders.

D2149 *Other Psychological Services.* Other psychological services which cannot be classified above.

D2150 *Speech Pathology and Audiology Services.* Activities which have as their purpose the identification, assessment, and treatment of pupils with impairments in speech, hearing, and language.

D2151 *Service Area Direction.* Activities associated with directing and managing speech pathology and audiology services.

D2152 *Speech Pathology Services.* Activities organized for the identification of pupils with speech and language disorders; diagnosis and appraisal of specific speech and language disorders; referral for medical or other professional attention necessary to the habilitation of speech and language disorders; provision of required speech habilitation services; and counseling and guidance of pupils, parents, and teachers, as appropriate.

D2153 *Audiology Services.* Activities organized for the identification of pupils with hearing loss; determination of the range, nature, and degree of hearing function; referral for medical or other professional attention as appropriate to the habilitation of hearing; provision of language habilitation; auditory training, speech reading (lip-reading), and speech conservation services as necessary; creation and administration of programs of hearing conservation; and counseling and guidance of pupils, parents, and teachers as appropriate.

D2159 *Other Speech Pathology and Audiology Services.* Other speech pathology and audiology services which cannot be classified above.

D2200 **Support Services—Instructional Staff.** Activities associated with assisting the instructional staff in the process of providing learning experiences for pupils.

D2210 *Improvement of Instruction Services.* Activities which are designed primarily to assist instructional staff in planning, developing, and evaluating the process of providing challenging and rewarding learning experiences for pupils. These activities include curriculum development, techniques of instruction, child development and understanding, and staff training.

D2211 *Service Area Direction.* Activities associated with directing and managing improvement of instruction services.

D2212 *Instruction and Curriculum Development Services.* Activities designed to aid teachers in developing the curriculum, preparing and utilizing special curriculum materials, and understanding and appreciating the various techniques which stimulate and motivate pupils.

D2213 *Instructional Staff Training Services.* Activities designed to contribute to the professional or occupational growth and competence of members of the instructional staff during the time of their service to the LEA. Among these activities are workshops, demonstrations, school visits, courses for college credit, sabbatical leaves, and travel leaves.

D2219 *Other Improvement of Instruction Services.*

D.–FUNCTION AND PROGRAM ASSIGNMENT (Continued)

Other improvement of instruction services which cannot be classified above.

D2220 *Educational Media Services.* Activities concerned with the use of all teaching and learning resources, including hardware and content materials. Educational media are defined as any devices, content materials, methods, or experiences used for teaching and learning purposes (including printed and nonprinted sensory materials).

D2121 *Service Area Direction.* Activities associated with directing and managing educational media services.

D2222 *School Library Services.* Activities such as selecting, acquiring, preparing, cataloging, and circulating books and other printed materials; planning the use of the library by teachers and other members of the instructional staff; and guiding instructional staff members in their use of library books and materials, whether maintained separately or as a part of an instructional materials center. Included here are activities for planning the use of the library by pupils and instructing pupils in the use of library books and materials, whether maintained separarely or as a part of an instructional materials center or related work-study area.

D2223 *Audiovisual Services.* Activities such as selecting, preparing, caring for, and making available to members of the instructional staff equipment, films, filmstrips, transparencies, tapes, television programs, and other similar materials, whether maintained separately or as a part of an instructional materials center. Included are activities in the audiovisual center, television studio, and related work-study areas, and the services provided by audiovisual personnel.

D2224 *Educational Television Services.* Activities concerned with planning, programming, writing, and presenting educational programs or segments of programs by way of closed circuit or broadcast television.

D2225 *Computer-Assisted Instruction Services.* Activities concerned with planning, programing, writing, and presenting educational programs or segments of programs which have been especially programed for a computer to be used as the principal medium of instruction.

D2229 *Other Educational Media Services.* Other educational media services which cannot be classified above.

D2300 **Support Services–General Administration.** Activities concerned with establishing and administering policy in connection with operating the LEA.

D2310 *Board of Education Services.* Activities of the elected or appointed body which has been created according to State law and vested with responsibilities for educational planning and policymaking for a governmental entity, usually designated as an LEA. These bodies are sometimes called school boards, governing boards of directors, school committees, and school trustees. This service area includes State boards, intermediate administrative unit boards, and local administrative unit boards.

D2311 *Service Area Direction.* Activities associated with directing and managing the general operation of the board of education. This area includes the activities of an executive of the board of education, such as an executive secretary, but does not include any special activities defined in the other areas of responsibility described below.

D2312 *Board Secretary Services.* Activities pertaining to the duties of the secretary (not executive) of the board of education.

D2313 *Board Treasurer Services.* Activities pertaining to the duties of the treasurer of the board of education.

D2314 *Election Services.* Activities pertaining to services rendered in connection with any LEA election, including elections of officers, bond elections, and budget and appropriation elections.

D2315 *Legal Services.* Activities pertaining to

counseling services provided to the board of education in regard to laws and statutes.

D2316 *Tax Assessment and Collection Services.* Activities pertaining to services rendered in connection with tax assessment and collection.

D2317 *Audit Services.* Activities pertaining to independent audit services provided to the board of education.

D2319 *Other Board of Education Services.* Other services to the board of education which cannot be classified above.

D2320 *Executive Administration Services.* Activities associated with the overall general administrative or executive responsibility for the entire LEA.

D2321 *Office of the Superintendent Services.* Activities performed by the superintendent and such assistants as deputy, associate, and assistant superintendents, in the general direction and management of all affairs of the LEA. This data element includes all personnel and materials in the office of the chief executive officer.

Activities of the offices of the deputy superintendent and associate or assistant superintendents (business, instruction, planning, personnel, etc.) should be entered here unless the activities can be placed properly into a single service area. In that case, they would be entered under "Service Area Direction" in that service area. When two or more service areas are directed by the same individual, the services of that individual's office are entered under "Office of the Superintendent Services" or divided proportionally between the service areas concerned.

D2322 *Community Relations Services.* Activities and programs developed and operated systemwide for betterment of school/community relations.

D2323 *Staff Relations and Negotiation Services.* Activities concerned with staff relations systemwide and the responsibilities for contractual negotiations with both instructional and noninstructional personnel.

D2324 *State and Federal Relations Services.* Activities associated with developing and maintaining good relationships with State and Federal officials.

D2329 *Other Executive Administration Services.* Other general administrative services which cannot be classified above.

D2400 **Support Services–School Administration.** Activities concerned with overall administrative responsibility for a single school or a group of schools.

D2410 *Office of the Principal Services.* Activities concerned with directing and managing the operation of a particular school or schools. This data element includes the activities performed by the principal, assistant principals, and other assistants in general supervision of all operations of the school, evaluation of the staff members of the school, assignment of duties to staff members, supervision and maintenance of the school records, and coordination of school instructional activities with instructional activities of the LEA. Clerical staff for these activities are included here.

D2490 *Other Support Services–School Administration.* Other school administration services which cannot be classified above.

D2500 **Support Services–Business.** Activities concerned with purchasing, paying, transporting, exchanging, and maintaining goods and services for the LEA. Included are the fiscal, acquisition of facilities, operation and maintenance, and internal services for operating all schools.

D2510 *Direction of Business Support Services.* Activities associated with directing and managing business support services.

D2520 *Fiscal Services.* Activities concerned with the fiscal operations of the LEA. This service area includes budgeting, receiving and disbursing, financial accounting, payroll, and internal auditing.

D2521 *Service Area Direction.* Activities associated with directing and managing fiscal services,

including debt management. The fiscal directions and management activities of the assistant superintendent, director, or business manager are included. (See D2321, "Office of the Superintendent Services," for further clarification).

D2522 *Budgeting Services.* Activites concerned with supervising budget planning, formulation, control, and analysis.

D2523 *Receiving and Disbursing Funds Services.* Activities concerned with taking in money and paying it out, including the current audit of receipts and the preaudit of requisitions or purchase orders to determine (1) whether the amounts are within the budgetary allowances, and (2) whetner such disbursements are lawful LEA expenditures.

D2524 *Payroll Services.* Activities concerned with making periodic payments to individuals entitled to remuneration for services rendered. Payments are also made for such payroll-associated costs as Federal income tax withholding, retirement, and social security.

D2525 *Financial Accounting Services.* Activities concerned with maintaining records of the financial operations and transactions of the LEA, including such activities as accounting and interpreting financial transactions and account records.

D2526 *Internal Auditing Services.* Activities concerned with verifying the account records, including evaluating the adequacy of the internal control system, verifying and safeguarding assets, reviewing the reliability of the accounting and reporting systems, and ascertaining compliance with established policies and procedures.

D2527 *Property Accounting Services.* Activities concerned with preparing and maintaining current inventory records of land, buildings, and movable equipment. These records are to be used in equipment control and facilities planning.

D2529 *Other Fiscal Services.* Other fiscal services which cannot be classified above.

D2530 *Facilities Acquisition and Construction Services.* Activities concerned with acquisition of land and buildings, remodeling and construction of buildings and additions to buildings, initial installation or extension of service systems and other built-in equipment, and improvements to sites.

D2531 *Service Area Direction.* Activities associated with directing and managing facilities acquisition and construction services.

D2532 *Land Acquisition and Development Services.* Activities concerned with the initial acquisition of sites and improvements thereon.

D2533 *Architecture and Engineering Services.* Activities of architects and engineers related to land acquisition and improvement and improvements to buildings.

D2534 *Educational Specifications Development Services.* Activities concerned with preparing and interpreting to architects and engineers descriptions of specific space requirements for the various learning experiences of pupils to be accommodated in a building. These specifications are interpreted to the architects and engineers in the early stages of blueprint development.

D2535 *Building Acquisition, Construction, and Improvement Services.* Activities concerned with building acquisition through purchase or construction and building improvements. This data element includes initial installation or extension of service systems and other built-in equipment as well as building additions.

D2539 *Other Facilities Acquisition and Construction Services.* Other facilities acquisition and construction activities which cannot be classified above.

D2540 *Operation and Maintenance of Plant Services.* Activities concerned with keeping the physical plant open, comfortable, and safe for use, and keeping the grounds, buildings, and equipment

in an effective working condition and state of repair. Activities which maintain safety in buildings, on the grounds, and in the vicinity of schools are included here.

D2541 *Service Area Direction.* Activities associated with directing and managing the operation and maintenance of the school plant facilities.

D2542 *Care and Upkeep of Buildings Services.* Activities concerned with keeping the physical plant clean and ready for daily use. This data element includes operating the heating, lighting, and ventilating systems and repairing and replacing facilities and equipment.

D2534 *Care and Upkeep of Grounds Services.* Activities concerned with maintaining land and improvements (other than buildings) in good condition.

D2544 *Care and Upkeep of Equipment Services.* Activities concerned with maintaining, in good condition, equipment owned or used by the LEA. This data element includes such activities as servicing and repairing furniture, machines, and movable equipment.

D2545 *Vehicle Servicing and Maintenance Services (other than buses).* Activities concerned with maintaining general purpose vehicles such as trucks, tractors, graders, and staff vehicles in good condition. This data element includes such activities as repairing vehicles, replacing vehicle parts, and preventive maintenance (cleaning, painting, greasing, fueling, and inspecting vehicles for safety).

D2546 *Security Services.* Activities concerned with maintaining order and safety in school buildings at all times, on the grounds, and in the vicinity of schools. Included are police activities for school functions and traffic control on grounds and in the vicinity of schools.

D2549 *Other Operation and Maintenance of Plant Services.* Other operation and maintenance of plant services which cannot be classified above.

D2550 *Pupil Transportation Services.* Activities concerned with the conveyance of pupils to and from school, as provided by State law. Included are all trips between home and school and trips to school activities.

D2551 *Service Area Direction.* Those activities associated with directing and managing pupil transportation services.

D2552 *Vehicle Operation Services.* Activities concerned with operating vehicles for pupil transportation from the time the vehicles leave the point of storage until they return to the point of storage. This data element includes driving buses or other pupil transportation vehicles.

D2553 *Monitoring Services.* Activities concerned with supervising pupils in the process of being transported between home and school and while being transported for school activities. These activities include supervision while in transit and while being loaded and unloaded, and directing traffic at the loading and unloading stations.

D2554 *Vehicle Servicing and Maintenance Services.* Activities concerned with maintaining pupil transportation vehicles in good condition, including repairing vehicles, replacing vehicle parts, and preventive maintenance (cleaning, painting, greasing, fueling, and inspecting vehicles for safety).

D2559 *Other Pupil Transportation Services.* Other pupil transportation services which cannot be classified above.

D2560 *Food Services.* Activities concerned with providing food to pupils and staff in a school or LEA. This service area includes the preparation and serving of regular and incidental meals (lunches or snacks) in connection with school activities, and the delivery of food.

D2561 *Service Area Direction.* Activities associated with directing and managing food services.

D2562 *Food Preparation and Dispensing Services.* Activities concerned with the preparation and serving of regular and incidental meals (lunches or snacks) to pupils and staff in a school or LEA. This data element includes cooking,

operating kitchen equipment, preparing food, serving food, cleaning dishes, and storing dishes and kitchen equipment.

D2563 *Food Delivery Services.* Activities concerned with delivering food to the school or LEA.

D2569 *Other Food Ssrvices.* Other food services which cannot be classified above.

D2570 *Internal Services.* Activities concerned with buying, storing, and distributing supplies, furniture, and equipment, as well as activities concerned with duplicating and printing for the LEA.

D2571 *Service Area Direction.* Activities associated with directing and managing the internal services.

D2572 *Purchasing Services.* Activities concerned with purchasing supplies, furniture, equipment, and materials used in school or LEA operation.

D2573 *Warehousing and Distributing Services.* Operation of the systemwide activities of receiving, storing, and distributing supplies, furniture, equipment, materials, and mail. This data element includes the pickup and transportation of cash from school facilities to the central administrative office or bank, for control and/or deposit.

D2574 *Printing, Publishing, and Duplicating Services.* Activities of printing and publishing administrative publications such as annual reports, school directories, and manuals. This data element also includes providing centralized services for duplicating school materials and instruments such as school bulletins, newsletters, and notices.

D2579 *Other Internal Services.* Other internal services which cannot be classified above.

D2580 *Residential Housing Services.* Activities concerned with providing living accommodations for students and staff members in facilities either owned or leased by the LEA.

D2581 *Service Area Direction.* Activities associated with directing and managing residential housing services.

D2582 *Student Residence Services.* Activities concerned with providing living accommodations for students in facilities either owned or leased by the LEA. This category may be subdivided into residences for single students and residences for married students.

D2583 *Staff Residence Services (other than administrative staff).* Activities concerned with providing living accommodations for staff members, other than administrative staff in facilities either owned or leased by the LEA.

D2584 *Administrative Staff Residence Services.* Activities concerned with providing living accommodations for administrative staff in facilities either owned or leased by the LEA.

D2589 *Other Residential Housing Services.* Activities concerned with providing living accommodations for students and staff which are not defined above.

D2590 *Other Support Services–Business.* Other business support services which cannot be classified above.

D2600 **Support Services–Central.** Activities, other than general administration, which support each of the other instructional and support services programs. These activities include planning, research, development, evaluation, information, staff, statistical, and data processing services.

D2610 *Direction of Central Support Services.* Activities associated with directing and managing the central support services as a group.

D2620 *Planning, Research, Development, and Evaluation Services.* Activities, on a systemwide basis, associated with conducting and managing programs of planning, research, development, and evaluation for an LEA.

D2621 *Service Area Direction.* Activities associated with directing and managing planning, research, development, and evaluation services.

D2622 *Development Services.* Activities concerned with the evolving process of utilizing the products of research in the improvement of educational programs.

D2623 *Evaluation Services.* Activities concerned with ascertaining or judging the degree or value of an action or an outcome by careful appraisal of previously specified data in light of the particular situation and the goals and objectives previously established.

D2624 *Planning Services.* Activities concerned with (1) the selection or identification of the overall, long-range goals, priorities, and objectives of an organization or program; and (2) the formulation of various courses of action in terms of identification of needs and relative costs and benefits for the purpose of deciding which courses of action are to be followed in striving to achieve those goals, priorities, and objectives.

D2625 *Research Services.* Activities concerned with establishing facts and principles through the systematic study and investigation of the various aspects of education.

D2629 *Other Planning, Research, Development, and Evaluation Services.* Other services of this nature which cannot be classified above.

D2630 *Information Services.* Activities concerned with writing, editing, and other preparation necessary to disseminate educational and administrative information to pupils, staff, managers, or the general public through direct mailing, the various news media, or personal contact.

D2631 *Service Area Direction.* Activities associated with directing and managing information services.

D2632 *Internal Information Services.* Activites concerned with the writing, editing, and communication of administrative information to pupils and staff.

D2633 *Public Information Services.* Activites concerned with writing, editing, and other preparation necessary to disseminate educational and administrative information to the public through various news media or personal contact.

D2634 *Management Information Services.* Activities concerned with writing, editing, and other preparation necessary to disseminate to management needed information about (1) the operation of the LEA; and (2) the community, State, and Nation, in order to support the decisionmaking process.

D2639 *Other Information Services.* Other information services not classified above.

D2640 *Staff Services.* Activities concerned with maintaining an efficient staff for the LEA, including recruiting and placement, staff transfers, in-service education, health services, and staff accounting.

D2641 *Service Area Direction.* Activities associated with directing and managing staff services.

D2642 *Recruitment and Placement Services.* Activities concerned with employing and assigning personnel for the LEA.

D2643 *Staff Accounting Services.* Services rendered in connection with the systematic recording and summarizing of information relating to staff members employed by the LEA.

D2644 *Inservice Education Services (for noninstructional staff).* Activities developed by the LEA for training of noninstructional personnel in all classifications.

D2645 *Health Services.* Activities concerned with medical, dental, and nurse services provided for LEA employees. Included are physical examinations, referrals, and emergency care.

D2649 *Other Staff Services.* Other staff services which cannot be classified above.

D2650 *Statistical Services.* Activities concerned with analyzing and reporting statistical information.

D2651 *Service Area Direction.* Activities concerned with directing and managing statistical services.

D2652 *Statistical Analysis Services.* Activities concerned with determining the nature and relationships of data elements in order to arrive at conclusions and recommendations. This data element includes institutional, management, and program studies on topics such as cost-effectiveness, space utilization, and teaching load.

D2653 *Statistical Reporting Services.* Activities concerned with assimilating statistical data into reports for further use. This data element includes preparation of questionnaires and data collection forms for internal as well as external use.

D2659 *Other Statistical Services.* Other statistical services which cannot be classified above.

D2660 *Data Processing Services.* Activities concerned with preparing data for storage, storing data, and retrieving them for reproduction as information for management and reporting.

D2661 *Service Area Direction.* Activities associated with directing and managing data processing services.

D2662 *Systems Analysis Services.* Activities concerned with the search for and evaluation of alternatives which are relevant to defined objectives, based on judgment and, wherever possible, on quantitative methods. Where applicable these activities pertain to the development of data processing procedures or their application to electronic data processing equipment.

D2663 *Programing Services.* Activities concerned with the preparation of a logical sequence of operations to be performed, either manually or electronically, in solving problems or processing data, and the preparation of coded instructions and data for such sequences.

D2664 *Operations Services.* Activities concerned with scheduling, maintaining, and producing data. These activities include operating business machines and data processing machines.

D2669 *Other Data Processing Services.* Other data processing services which cannot be classified above.

D2690 *Other Support Services–Central.* Other central support services which cannot be classified above.

D2900 **Other Support Services.** Activities which include any support service or classification of services, general in nature, which cannot be classified in the above service areas or areas of responsibility.

D3000 COMMUNITY SERVICES

Activities that are not directly relatable to providing education for pupils in an LEA. These include services such as community recreation programs, civic activities, public libraries, programs of custody and care of children, and community welfare activities, provided by the LEA for the community as a whole or for some segment of the community.

D3100 **Direction of Community Services Activities.** Activities concerned with directing and managing community services activities.

D3200 **Community Recreation Services.** Activities concerned with providing recreation for the community as a whole, or for some segment of the community. This subfunction includes such staff activities as organizing and supervising playgrounds and swimming pools, as well as other recreation programs for the community.

D3300 **Civic Activities.** Activities concerned with providing services to civic affairs or organizations. This subfunction includes services to parent-teacher association meetings, public forums, lectures, and civil defense planning.

D3400 **Public Library Services.** Activities pertaining to the operation of public libraries by an LEA, or the provision of library services to the general public through the school library. Included are such activities as planning the library's collection in light of community needs and informing the community of public library resources and services.

D3500 **Custody and Care of Children.** Activities con-

cerned with providing programs for the custodial care of children in residential day schools or in child care centers which are not part of, nor directly related to, the instructional program, and where the attendance of the children is not included in the attendance figures for the LEA.

D3600 Welfare Activities. Activities concerned with providing for the personal needs of individuals who have been designated as needy by an appropriate governmental entity. These activities include payment of stipends for school attendance; payment of salaries to pupils for work performed (whether for the LEA or for an outside concern), or provision of clothing, food, or other personal needs.

D3700 Nonpublic School Pupil Services. Services to pupils attending a school established by an agency other than the State, subdivision of the State, or the Federal Government, which usually is supported primarily by nonpublic funds. Included are provision of instruction services, attendance and social work services, health services, and transportation services for nonpublic school pupils.

D3900 Other Community Services. Other services provided the community which cannot be classified above.

E.—SUBJECT MATTER AREA

The E series identifies the subject matter areas in which the staff members with "Teaching"[1] assignments function; the series is related programmatically to the various program areas in the "Instruction" function (D1000). Only an abbreviated definition is given for each subject matter area; the complete definition in Handbook VI is referenced. The related courses and units of subject matter listed under each subject area are summaries of the major divisions named under each area in Handbook VI.

In some cases, these subject matter areas may be subdivided further—for example, an administrator may want to classify the "Foreign Languages" element (E1006) into "Classical Languages," "Modern Foreign Languages," and "Humanities." Each of these, in turn, could be broken down into specific language studies with elements such as "Literature" and "Grammar" within each.

It should be noted that the last two digits in this series correspond to the listing of subject matter areas and cocurricular activities in Handbook VI. For a complete definition of each subject matter area and for more detailed subdivisions of individual courses or types of activities under each, see that handbook.

E1001 Agriculture. "Agriculture" comprises the group of related courses or units of subject matter which are organized for carrying on learning experiences concerned with preparation for, or upgrading in, occupations requiring knowledge and skills in agricultural subjects. The functions of agricultural production, agricultural supply, agricultural mechanization, agricultural products (processing), ornamental horticulture, forestry, agricultural resources, and the services related thereto, are emphasized in the instruction designed to provide opportunities for pupils to prepare for or improve their competencies in agricultural occupations. An agricultural occupation may include one or any combination of these functions. (See H-VI, p. 153.)

Related courses or units of subject matter would include agricultural production; agricultural supplies/services; agricultural mechanics; agricultural products; ornamental horticulture; agricultural resources; forestry production, processing, management, marketing, and services; and other agricultural areas.

E1002 Art. "Art" comprises the organized body of subject matter or related courses involving primarily visual, tactile, and kinesthetic expression. Included in instruction are the two-dimensional forms such as drawing, painting, or printmaking; the three-dimensional forms such as sculpture or pottery; other spatial concepts such as architecture and design for the performing arts; and the history and theory of art. Emphasis is placed upon the esthetic and creative factors of visual forms. (See H-VI, p. 158.)

[1] "Teaching" assignments include "Teaching," "Teaching Intern," "Student-Teaching," "Teaching Assistant," and "Teaching Aide" assignments.

Subject matter or related courses or units would include art history and theory, art studio, and other art.

E1003 Business. "Business" includes the body of related subject matter or courses and planned learning experiences which are designed to develop in pupils the attitudes, knowledge, skills, and understanding concerned with business principles and practices having applications for personal use and/or activities in the business world. Business also includes a wide variety of aspects of general education; e.g., subject matter from other subject areas such as English (language arts), social sciences/social studies, and mathematics. (See H-VI, p. 160.)

Related courses and planned learning experiences include accounting, bookkeeping, budget control, business arithmetic or mathematics, business communications, business ethics, business finance, business law, business machines, business psychology, business statistics, office work experience, clerical practice, consumer education, credit and collections, data processing and computer operation, economics, economic geography, exploratory business, filing and record control, general business or introduction to business, insurance and risk, investments, business and management principles, marketing, office practice, personal development and human relations, personal finance, real estate, retailing, statesmanship principles, shorthand, stenography, typing, and other business areas.

E1004 Distributive Education. "Distributive Education" includes various combinations of subject matter and learning experiences related to the performance of activities that direct the flow of goods and services, including their appropriate utilization, from the producer to the consumer or user. These activities include selling and such sales-supporting functions as buying, transporting, storing, promoting, financing, marketing research, and management. (See H-VI, p. 170.)

Combinations of subject matter and learning experiences include advertising services, apparel and accessories, automotive, finance and credit, floristry, food distribution, food services, general merchandise, hardware, building materials, farm and garden supplies and equipment, home furnishing, hotel and lodging, industrial marketing, insurance, international trade, personal services, petroleum, real estate, recreation and tourism, transportation, other retail trade, other wholesale trade, and other programs.

E1005 English Language Arts. "English Language Arts" comprises the body of related subject matter or courses organized for carrying on learning experiences concerned with developing (1) an understanding of the language system, (2) proficiency in the use of the English language, (3) appreciation of a variety of literary forms, (4) understanding and appreciation of various aspects of past and present cultures as expressed in literature, and (5) interests which will motivate lifelong learning. (See H-VI, p. 177.)

Related courses or related subject matter include language skills, linguistics, literature, composition, speech, dramatic arts, and other English language arts.

E1006 Foreign Languages. The body of subject matter in this area comprises a variety of foreign languages, including English as a foreign language. Classified under this heading are the various classical and modern foreign languages.

Usually, the activities involved in the teaching and learning of a foreign language are planned in terms of selected objectives:

(1) To assist the pupil in acquiring progressive proficiency in control of the skills of listening comprehension, speaking, reading, writing, and structural analysis.

(2) To develop the pupil's capacity to apply these acquired skills in understanding, analyzing, and interpreting a variety of forms of past and current thought.

(3) To increase the pupil's knowledge and understanding of the countries, cultures, and attitudes of the peoples whose language is being learned.

(See H-VI, p. 183.)

Related subject matter or courses would include the humanities.

E1007 Health Occupations Education. "Health Occupations Education" comprises the body of related subject matter or courses and planned experiences designed to impart knowledge and develop understanding and skills required to support the health professions. Instruction is organized to prepare pupils for occupational objectives concerned with assisting qualified personnel in providing diagnostic, therapeutic, preventive, restorative, and rehabilitative services, including the understanding and skills essential to provide care and health services to patients. (See H-VI, p. 184.)

Related courses and planned experiences include dental technology, medical laboratory technology, nursing, rehabilitation, radiology, ophthalmology, environmental health, mental health technology, and miscellaneous health occupations education.

E1008 Health and Safety in Daily Living, Physical Education, and Recreation. The body of related subject matter and activities in "Health and Safety in Daily Living, Physical Education, and Recreation" includes learning experiences concerned with developing (1) knowledge, attitudes, appreciations, and conduct essential to individual and group health; (2) awareness of, concern for, and knowledge, skills, and judgment necessary for personal and public safety in the home, at school, on the job, and in traffic; and (3) skills necessary for encouraging physical and mental growth and fitness by means of activities designed to improve the muscles, motor skills, and attitudes and habits of conduct of individuals and groups. (See H-VI, p. 184.)

Related subject matter and activities would include health, safety in daily living, physical education, and recreation.

E1009 Home Economics. "Home Economics" comprises the group of related courses or units of instruction organized for purposes of enabling pupils to acquire knowledge and develop understanding, attitudes, and skills relevant to (1) personal, home, and family life; and (2) occupational preparation requiring the knowledge and skills of home economics. The subject matter of home economics includes, in addition to that which is unique to the area, concepts drawn from the natural and social sciences and the humanities. (See H-VI, p. 193.)

Related courses or units of instruction include homemaking; preparation for personal, home, and family living; and occupational preparation.

E1010 Industrial Arts. "Industrial Arts" is the body of related subject matter or courses organized for the development of understanding about the technical, consumer, occupational, recreational, organizational, managerial, social, historical, and cultural aspects of industry and technology. Learning experiences involve activities such as experimenting with, and designing, constructing, evaluating, and using tools, machines, and materials. Learning activities provide opportunities for creativity and problem solving. (See H-VI, p. 195.)

Related subject matter or related courses would include construction, crafts (industrial), drafting, electricity/electronics, elementary school industrial arts, general industrial arts, graphic arts, home mechanics, industrial arts mathematics, industrial arts science (applied chemistry), industrial arts science (applied physics), industrial materials and processes, manufacturing, metals, plastics, power/automotive mechanics, research and development, service industries, woods, and other industrial arts.

E1011 Mathematics. "Mathematics" comprises the body of related subject matter or courses organized for carrying on learning experiences concerned with the science of relations existing between quantities (magnitude) and operations, and the science of methods used for deducing from other quantities, known or supposed, the quantities sought. (See H-VI, p. 199.)

Related subject matter or related courses include elementary school mathematics, mathematics for seventh and eighth grades, algebra,

algebra and trigonometry (intergrated), applied mathematics, calculus, calculus with analytic geometry, computer mathematics, elementary functions, first-year college mathematics for elementary school teachers, general mathematics, geometry, introduction to analysis, liberal arts mathematics, probability and statistics, trigonometry, and other mathematics.

E1012 Music. "Music" is the fine art that utilizes sounds in time in a meaningful and organized manner. Subject matter and activities in music are designed to impart the skills and knowledge necessary for the understanding, appreciation, creation, performance, and enjoyment of music. (See H-VI, p. 208.)

Related subject matter and activities would include music (general education), music literature and/or history, music theory, vocal music, instrumental music, rhythm and body movement, other music, and humanities.

E1013 Natural Sciences. "Natural Sciences" includes the body of related subject matter or courses organized for carrying on learning experineces concerned with knowledge of the physical and biological world, and of the processes of discovering and validating this knowledge. (See H-VI, p. 209.)

Related subject matter or courses would include general science (including elementary school science), biological sciences, physical sciences, and earth-space sciences.

E1014 Office Occupations. This body of subject matter, involving combinations of courses and practical experience, is organized into programs of instruction to provide opportunities for pupils to prepare for and achieve career objectives in selected office occupations. In the instructional process various aspects of subject matter frequently are drawn from other subject matter areas. Learning experiences are designed to lead to employment and/or advancement of individuals in occupations related to the "facilitating function" in public or private enterprises or organizations. The "facilitating function," as used here, refers to the expediting role between the production and distribution activities of an organization. Included are a variety of activities, such as recording and retrieval of data, supervision and coordination of office activities, internal and external communication, and the reporting of information. (See H-VI, p. 213.)

Programs of instruction would include accounting and computing occupations; business data processing systems occupations; filing, office machines, and general office clerical occupations; information communication occupations; materials support occupations, transporting, storing, and recording; personnel, training, and related occupations; stenographic, secretarial, and related occupations; and other office occupations.

E1015 Social Sciences/Social Studies. "Social Sciences/Social Studies" comprises interrelated subject matter areas including history, economics, political science, sociology, anthropology, psychology, geography, and philosophy, organized to impart knowledge, develop skills, and identify goals concerning elements and institutions of human society. The social studies are comprised of those aspects of the above disciplines which in practice are selected for instructional purposes in schools and colleges.

Employing systematic, analytical, and theoretical methods, the social sciences include modes of inquiry such as historical or genetic approaches, survey research, experimentation, content analysis, and logical analysis. Illustrative techniques include field studies, case studies, statistical analysis, map and photo interpretations, simulation, participant observation, polling, questionnaires, and others. (See H-VI, p. 218.)

Interrelated subject matter would include anthropology, area studies, citizenship education, economics, geography, history, humanities, philosophy, political science, psychology, sociology, and other social sciences/social studies.

E1016 Technical Education. "Technical Education" is concerned with that body of knowledge organ-

ized in a planned sequence of classroom and laboratory experiences, usually at the post-secondary level, to prepare pupils for a cluster of job opportunities in a specialized field of technology. The program of instruction normally includes the study of the underlying sciences and supporting mathematics inherent in a technology, as well as methods, skills, materials, and processes commonly used and services performed in the technology. A planned sequence of study and extensive knowledge in a field of specialization is required in technical education, including competency in the basic communication skills and related general education. Technical education prepares the student for the occupational area between the skilled crafts and the professions. (See H-VI, p. 223.)

Sequences of classroom and laboratory experiences would include engineering-related technology, agricultural-related technology, health-related technology, office-related technology, home economics-related technology, and miscellaneous technical education.

E1017 Trade and Industrial Occupations. "Trade and Industrial Occupations" constitutes the branch of vocational education concerned with preparing persons for initial employment, or for upgrading or retraining workers in a wide range of occupations in trade and industry. Such occupations are skilled or semiskilled and are concerned with layout designing, producing, processing, assembling, testing, maintaining, servicing, or repairing any product or commodity. Instruction is provided in basic manipulative skills, safety judgment, and related occupational skills in mathematics, drafting, and science required to perform successfully in the occupation through a combination of classroom learning and shop or laboratory experiences simulating those found in industry. Included is instruction for apprentices in apprenticible occupations or for journerymen already engaged in a trade or industrial occupation. Also included is training for certain related service and semi-professional occupations. (See H-VI, p. 228.)

Areas of instruction and training would include air conditioning; applicance repair; automotive services; aviation occupations; blueprint reading; business maintenance; commercial art occupations; commercial fishery occupations; commercial photography occupations; construction and maintenance trades; diesel mechanic occupations; drafting occupations; electrical occupations; electronics occupations; fabric maintenance services; foremanship, supervision, and management development; graphic arts occupations; industrial atomic energy occupations; instrument maintenance and repair occupations; maritime occupations; metalworking occupations; metallurgy occupations; personal services; plastic occupations; public service occupations; quantity food occupations; refrigeration; small engine repair; stationary energy sources occupations; textile production and fabrication; leatherworking; upholstering; woodworking occupations; and other trade and industrial occupations.

E1018 General Elementary Education and General Secondary Education. The designation "General Elementary Education and General Secondary Education," as classified in Chapter 5 and defined in Chapter 6 of Handbook VI, refers to instruction which takes place in a self-contained class. Learning experiences are concerned with the knowledges, skills, appreciations, attitudes, and behavioral characteristics which should be achieved by all pupils to the limits of their capacities during the elementary and secondary school years or grades. (See H-VI, p. 238.)

Learning experiences would include education for the general elementary years or grades, the middle school level, and general secondary years or grades.

E1019 Differentialized Curriculum for Handicapped Pupils. The "Differentialized Curriculum for Handicapped Pupils" reflects an increasing awareness today of the individual needs of children. Many children with various types of handicaps cannot benefit from basic subject matter without special education. Handicapped children have learning difficulties and sensory and motor impairments which require careful study for successful adaptation of instruction.

Teachers of exceptional children integrate professional information from psychology, education, and medicine for instructional and therapeutic services. Consequently, special education as applied to each type of handicapped child requires distinctive techniques and materials which distinguish it from regular classroom instruction. (See H-VI, p. 239.)

Areas of instruction would include communication skills, interpersonal and behavioral coping skills, motor skills, perceptual skills, vocational and avocational skills, and other differentialized curriculum for handicapped pupils.

E1020 Cocurricular Activities. "Cocurricular Activities" comprises the group of school-sponsored activities, conducted under the guidance or supervision of qualified adults, designed to provide opportunities for pupils to participate, on an individual basis or in small or large groups, in school events, public events, or a combination of these, for purposes such as motivation, enjoyment, and improvement of skills. In practice, participation usually is not required and credit usually is not given. When participation is required or credit is given the activity generally is considered to be a course. (See H-VI, p. 242.)

School-sponsored activities would include academic cocurricular activities, athletic and sport cocurricular activities, music cocurricular activities, school and/or public service cocurricular activities, and social cocurricular activities.

E1021 Safety and Driver Education. The subject matter and related activities comprising "Safety and Driver Education" are organized for carrying on learning experiences concerned with developing in the learner the ability to respond appropriately and efficiently as an operator of a motor vehicle, and as a pedestrian in traffic. More specifically, instruction emphasizes attainment of the following:

(1) Appropriate knowledge and efficiency for dealing with traffic conditions
(2) Fundamental driving skills and correct skill habits
(3) Desirable behavior patterns in traffic
(4) An understanding of driver and pedestrian limitations, obligations, and responsibilities
(5) Knowledge about the motor vehicle and understanding of how society may achieve maximum efficiency in operating its motor vehicle transportation system.

(See H-VI, p. 247.)

Subject matter and related activities would include driver education and safety education.

E1022 Junior ROTC. "Junior ROTC" comprises a body of subject matter, or a combination of courses and practical experiences, organized into programs of instruction to provide opportunities for pupils to prepare for and achieve career objectives in slected branches of the military service. Various aspects of subject matter frequently are drawn from other areas.

Instruction is concerned with developing (1) patriotism, self-reliance, leadership, and responsiveness to constituted authority; (2) knowledge of basic military skills and appreciation of the role of the military services in military defense; and (3) strength of character and understanding of the responsibility of citizenship in a democratic society. (See H-VI, p. 248.)

Subject matter or combinations of courses and practical experience would include Army Junior ROTC, Navy Junior ROTC, Air Force Junior ROTC, and Marine Corps Junior ROTC.

F.—CONDITIONS OF CURRENT ASSIGNMENT

This dimension relates each current assignment of the staff member with other organizational elements such as the scope and timing of the assignment and its location and schedule. (The latter two elements should assist an administrator in locating a staff member at any specific time.)

F1000 SCOPE AND TIMING OF CURRENT ASSIGNMENT

F1100 Scope of Current Assignment. Classification of the staff member's assigned activities according

to the range or extent of the assignment. Separate entries should be made in full-time equivalency of assignment if the staff member has more than one assignment.

F1110 *More-Than-Systemwide.* A full-time or less-than-full-time assignment to a staff member consisting of activities which extend or apply to more than one LEA or system, but which are not statewide in their application.

F1120 *Systemwide.* A full-time or less-than-full-time assignment to a staff member consisting of activities which extend or apply to all of the operational units in the LEA or to all of the units in the LEA at one operational level where the activities apply.

F1130 *Multioperational Unit but Less-Than-Systemwide.* A full-time or less-than-full-time assignment to a staff member consisting of activities which extend or apply to more than a single school or single supporting services unit in the LEA, but which are not systemwide in their application.

F1140 *Single Operational Unit.* A full-time or less-than-full-time assignment to a staff member consisting of activities which extend or apply to only a single school or to a single supporting services unit.

F1200 Timing of Current Assignment(s). The fiscal or calendar year and duration of the staff member's current assignment(s). Separate entries should be made for each assignment.

F1210 *Fiscal Year of Current Assignment.* The fiscal year in which the staff member carries out his or her current assignment.

F1220 *Calendar Year (if used by LEA).* The calendar year in which the staff member carries out his or her current assignment.

F1230 *Term of Current Assignment.* A division of the school year (the 12-month period of time denoting the beginning and ending dates for school accounting purposes) which may be divided into regular and summer terms, semesters, trimesters, quarters, or whatever division is used by the LEA. In the case of teaching substitutes or other staff members who have temporary assignments, the term should be designated as "intermittent."

F1240 *Date of Beginning of Current Assignment.* The month, day, and year on which the staff member's current assignment began.

F2000 OPERATIONAL UNIT AND LOCATION OF CURRENT ASSIGNMENT

The operational unit to which the staff member is assigned and the location and specific building in which the assignment is performed.

F2100 Operational Unit to Which Assigned. The specific entity to which the staff member is assigned and for which funds are allocated. (See OE Handbook II, p. 61, for a more detailed discussion of the operational unit as a dimension in fund allocation.) Examples of such entities include a specific school (e.g., Elm Tree High School), general administration (e.g., the central administrative office), transportation (e.g., the main bus garage), or warehousing (e.g., the main warehouse). This dimension may be subdivided into as many entities as necessary.

F2200 Location of Assignment. The site and building at which a staff member performs an assignment.

F2210 *Facility.* One or more buildings on a site belonging to or used by an LEA for school purposes. The facility should be identified by name and/or number.

F2211 *Day/Evening Facility.* A building or site, belonging to or used by an LEA, which pupils attend during any part of the day or evening (as distinguished from a residential school).

F2212 *Residential Facility.* A building or site, belonging to or used by an educational institution, at which pupils are boarded and lodged as well as taught.

F2213 *Shared Facility.* A building or site which belongs to either a public or nonpublic school agency but which is used by both. This category would include private residential

schools which also are used for public school classes.

F2220 *Community Facility.* A building or site belonging to the community and used by the school for school purposes. Any such community facility should be specified.

F2230 *Home of Pupil.* The home or residence of a pupil. For local use, the specific home or residence should be identified.

F2240 *Hospital.* A building or site belonging to or used by a hospital, sanatorium, or convalescent home. The specific institution and room number or other space designation should be given.

F2250 *Supportive Facility.* A building or site not necessarily used for instructional purposes, such as an administrative office, a carpool or garage, or a warehouse. The address of any such facility should be specified.

F2290 *Other Facility.* A location (other than those included under items F2210 through 2250), belonging to or used by a service organization or public noneducational agency, such as a commercial television studio, a summer camp, or a building or site. Any such facility and the agency to which it belongs should be identified.

F3000 SCHEDULE FOR CURRENT ASSIGNMENT

Data elements describing the specific time schedule for each current assignment of the staff member.

F3100 Assigned Days of the Week. The specific days of the week when the staff member currently is scheduled for each assignment.

F3200 Assigned Hours of the Day. The specific hours, if applicable, during each school day (e.g., 9:00-10:00 a.m.) when the staff member currently is scheduled for each assignment.

F4000 STAFF ASSIGNMENT WORKLOAD

Data about the factors used in measuring a staff member's efforts in fulfilling an assignment, including the type of activity, the unit of work, and the time involved in the task. These data elements are used in making decisions regarding the number of staff members needed for a particular task or job; e.g., the number of counselors needed for elementary pupils, the number of teacher aides needed for elementary pupils, the number of teacher aides needed in a particular program area, the number of painters needed to keep facilities protected from weather.

F4100 Type of Activity. An extension of the staff assignment workload description to more fully define the activity to be measured. For example, a "Counseling" assignment should be defined in terms of the types of duties involved, such as counseling pupils in groups or as individuals. Other examples of activity types include electrical plant engineering or electrical maintenance, teaching in a learning-by-doing setting or in an abstract or vicarious setting (studying about something), or television teaching with or without follow-up responsibility.

F4200 Unit of Work. The number or amount of objects serviced or recipients served by staff member's efforts. Examples of units, which form the basis for establishing the measure of the staff member's efforts, include pupils, groups of pupils, square feet (for cleaners or painters), drops or outlets (for electricians).

F4300 Time. The number of units of time relevant to measuring the unit of work in which the staff member is engaged. Units of work may be measured in hours, days, weeks, or terms. A painter employed by the hour would be measured by the number of squares (e.g., 10 feet by 10 feet) painted per hour, while a counselor's efforts would be measured by the number of pupils counseled per week and term.

G.—CURRENT EMPLOYMENT

Employment data include material on the staff member's contractual status with the LEA as well as personnel data on participation in insurance and retirement programs, current leave status, and salary.

G1000 EMPLOYMENT INFORMATION

G1100 Means of Introduction to the LEA. Data on the way in which the staff member was initially introduced to the LEA or the way in which the LEA became aware of the staff member's availability for employment. These data can be used by the local administrator in developing a history of recruitment efforts; depending upon needs, the elements can be expanded or reduced.

G1110 *LEA Recruitment Effort.* The staff member was introduced to the LEA through a formal (e.g., placement office) or informal effort on the part of the LEA to recruit staff members through colleges, universities, vocational institutes, schools, or other institutions.

G1120 *Staff Recommendation.* Another staff member already employed by the LEA recommended the new staff member for employment.

G1130 *Work-Related Organization Recommendation.* The staff member was introduced to the LEA and recommended for employment by a work-related organization.

G1140 *Advertising by the LEA.* The staff member was introduced to the LEA by such advertising techniques as newspaper or radio advertisements.

G1150 *Employment Agency.* The staff member was introduced to the LEA through a governmental agency, union, or private employment agency.

G1160 *Student Teaching or Internship.* The staff member was introduced to the LEA during the period of student teaching or internship and was subsequently hired.

G1170 *Employee-Initiated Effort.* The staff member, through his own efforts, initiated his introduction to the LEA.

G1190 *Other Means.* The staff member was introduced to the LEA through means other than those listed under the above data elements. Such means should be specified.

G1200 Time of Employment. The employing date and the number of years the staff member has been employed in the various assignments.

G1210 *Date Staff Member Was First Employed in LEA.* The month, day, and year when the staff member first entered into employment with the LEA and assumed responsibilities.

G1220 *Number of Years Employed in LEA.* The total number of years that the staff member has been employed in the LEA. (At the discretion of the local administrator, this element can be subdivided by job location within the LEA.)

G1230 *Number of Years in Current Assignment.* The total number of years that the staff member has been functioning in the current assignment.

G1240 *Number of Years in Other Assignments With the LEA.* The total number of years in each assignment other than the current one.

G1300 Employment Status. The circumstances under which the staff member serves the LEA.

G1310 *Probationary.* The employment status of a staff member who is employed preliminary to being placed on tenure status upon satisfactory performance over a stipulated period of time.

G1320 *Temporary.* The employment status of a staff member who is employed on a per diem basis year-to-year, term-to-term, or day-to-day.

G1330 *Tenure of Permanent.* The employment status of a staff member whose employment is not subject to discontinuance by the governing authority except by due process.

G1390 *Other Employment Status.* The employment status of a staff member who is not on probationary, temporary, tenure, or permanent status. Examples of staff members having this status are those on contracts with no tenure arrangements, those long-term substitute staff members who serve in the capacity of regular staff members but whose service does not qualify them for tenure, and those staff members who have been suspended.

G.–CURRENT EMPLOYMENT (Continued)

G1400 Contractual Status. The type of contract under which the staff member is serving the LEA.

G1410 *Annual Contract.* A contract covering a period of one fiscal year.

G1420 *Multiyear Contract.* A contract covering a period of two or more consecutive years.

G1430 *Continuing Contract.* A contract which continues automatically from year to year without action on the part of the governing authority, but which may be terminated through appropriate action on the part of the parties involved.

G1440 *Volunteer/No Contract.* An agreement under which the staff member provides services and conforms to the regulations of the LEA, but does not receive remuneration. No formal contract exists.

G1490 *Other Agreement.* A contract or agreement other than those described in elements G1410 through G1440, such as a letter of intent or an unwritten agreement.

G1500 Contract Dates. Significant dates (month, day, and year) contained in the contract between the staff member and the governing authority, including the dates when staff services are to begin and end, the date the contract was made valid, and the date the contract was terminated for any reason.

G1600 Amount of Time Employed Annually. The number of calendar months annually the staff member is employed to perform an assignment for the LEA. Months are to be reported to the nearest half. For staff members employed for short periods of time, such as in adult education programs, number of weeks may be a more practical entry. If number of weeks rather than months is used, this deviation should be indicated clearly.

G1700 Coverage Under the Provisions of the Fair Labor Standards Act. Identification of the staff member's assignment as to whether it falls under the provisions of the Fair Labor Standards Act, which establishes a Federal minimum wage and eligibility for receiving overtime pay. (Coverage depends upon the extent of managerial responsibility, use of independent discretion, position qualifications, and pay level of the assignment.)

G1710 *Nonexempt Status.* The staff member's assignment is covered by the Federal minimum wage provisions, and he is eligible for overtime pay.

G1720 *Exempt Status.* The staff member's assignment is not covered by the Act.

G2000 SALARY OR WAGE

Data about the annual contractual salary, wage, or wage rate expected to be paid to the staff member for the period of employed time during the current school year. If an instructional staff member such as a teacher, librarian, or counselor is employed for both the regular school term and the summer school term, a separate entry should be made to indicate the amount expected to be paid the staff member for each term.

G2100 Contract Salary or Wage. The contractual salary or wage, before deductions, expected to be paid to the staff member during the current school year.

G2200 Additional Salary or Wage. The amount of money before deductions (not included in element G2100) expected to be paid to the staff member during the current school year for such activities as extra duty and overtime.

G2300 Other Salary or Wage Rate. The rate of pay (e.g., hourly or daily) to be paid a staff member during the current school year. The wage rate is to be recorded under this item for those staff members whose salary or wage varies to the extent that an entry under element G2100 would not be practical.

G2400 Other Types of Compensation. Any nonmonetary compensation (e.g., a car allowance, use of a rent-free house, free meals while at work) which a staff member receives as part of the

total compensation. The type of compensation should be specified.

G3000 INSURANCE

Data concerning the staff member's membership in an insurance plan for which the LEA has accounting responsibilities.

G3100 Health Insurance. Data about the staff member's membership in a health insurance plan for which the LEA has accounting responsibilities. This category would include regular hospital and surgical benefits as well as major medical coverage.

G3110 *Eligibility for Health Insurance.* Entry as to whether the staff member is or is not eligible for health insurance.

G3111 *Reason, if Ineligible.* Specified reason for staff member's ineligibility.

G3120 *Name of Insuring Company.* The name of the company insuring the staff member.

G3130 *Effective Date of Coverage.* The month, day, and year on which the staff member's health insurance coverage began.

G3140 *Type of Coverage.* The type of coverage (e.g., family coverage, high option, low option) which the staff member has selected.

G3150 *Amount of Payment Per Pay Period.* The monetary amount the staff member must pay each pay period for the health insurance coverage.

G3160 *Additional Health Coverage.* Any additional monetary contribution which the staff member makes to the health insurance plan in order to have additional health coverage.

G3170 *Effective Date of Additional Coverage.* The month, day, and year on which the staff member's additional health insurance coverage became effective.

G3180 *Amount of Payment Per Pay Period for Additional Coverage.* The monetary amount that the staff member must pay per pay period for additional health insurance coverage.

G3200 Life Insurance. Data about the staff member's membership in a life insurance plan for which the LEA has accounting responsibilities.

G3210 *Eligibility for Life Insurance.* Entry as to whether staff member is or is not eligible for life insurance.

G3211 *Reason, if Ineligible.* Specified reason for staff member's ineligibility.

G3220 *Name of Insuring Company.* The name of the company insuring the staff member.

G3230 *Effective Date of Coverage.* The month, day, and year on which the staff member's life insurance coverage began.

G3240 *Type of Coverage.* The type of life insurance coverage chosen by the staff member (e.g., term, whole life, contributory).

G3250 *Amount of Coverage.* The total amount for which the staff member's life is insured.

G3260 *Staff Member's Contribution Per Pay Period to Premium.* The monetary amount the staff member contributes per pay period to his or her share of the premium payment.

G3270 *Special Terms.* The specific benefits of the staff member's life insurance policy (e.g., double indemnity benefits).

G3280 *Name and Address of Beneficiary.* The name and address (street number and name, city or county, and State) of the beneficiary named by the staff member in the life insurance policy.

G3300 Other Insurance. Data on the staff member's membership in other insurance plans (e.g., liability, disability, dental insurance) for which the LEA has accounting responsibilities. At the discretion of the local administrator, this category may be expanded to contain data elements appropriate to the type of insurance, similar to the elements under G3100, Health Insurance, and G3200, Life Insurance.

G.–CURRENT EMPLOYMENT (Continued)

G4000 SPECIAL PAYROLL ARRANGEMENTS

Any special payroll deductions or paycheck arrangements which the staff member has specifically requested and for which the LEA has accounting responsibilities. This category would include arrangements for direct deposit of paychecks to the staff member's bank and special continuing deductions such as those for savings bonds, union dues, and large charitable contributions (e.g., a contribution to the United Givers' Fund deducted over a year). Any such special arrangements should specify the amount to be deducted per pay period from the staff member's paycheck or voucher.

G5000 RETIREMENT

Data relating to the staff member's membership in a retirement system for which the LEA has accounting responsibilities. Examples of elements would include the date (month, day, and year) when the staff member entered the retirement system, years of creditable service, earliest possible date of retirement, date of mandatory retirement, actual date of retirement, and condition of retirement.

G5100 **Retirement Program.** The program adopted by an LEA which formally specifies the benefits that staff members will receive at various ages and lengths of service.

G5110 *Eligibility for Retirement Program.* Designation as to whether the staff member is or is not eligible for membership in the LEA's retirement program.

G5120 *Type of Program in Which the Staff Member Is Participating.* The specific kind of retirement program (e.g., a State annuity program) in which the staff member has membership.

G5130 *Anticipated Retirement Date.* The earliest possible date when the staff member will be eligible for retirement.

G5140 *Effective Date of Entering Retirement Program.* The month, day, and year on which the staff member entered the retirement program.

G5150 *Staff Member's Contribution to Retirement Program.* The amount which the staff member contributes each pay period to the LEA's retirement program.

G5160 *Retirement Plan Option Selected by Staff Member.* The retirement plan option (e.g., normal retirement, postponed retirement, early retirement, reduced pension, survivors benefits), which the staff member has selected. The various options would depend upon the individual LEA, and the descriptive terms entered should be specified for consistency by the local administrator.

G6000 SERVICE AND LEAVE STATUS

G6100 **Current Service Status.** Data as to whether the staff member has full-time or part-time service status in the LEA.

G6110 *Full-Time.* A staff member whose total current assignments, regardless of their classification, require his or her services throughout the school term for at least the number of hours equal to the hours in a regular school day.

G6120 *Part-Time.* A staff member whose total current assignments require less than his full-time services. A part-time staff member may be employed full-time for part of the school term or part-time for part or all of the school term.

G6121 *Hours Per Week.* The average number of hours per week that the part-time staff member is expected to work.

G6122 *Full-Time Equivalency of Assignment.* The amount of time for a less-than-full-time assignment divided by the amount of time normally required in a corresponding full-time assignment. Full-time equivalency usually is expressed as a decimal fraction to the nearest tenth. (See chapter 6, p. 88.)

G6123 *Substitute Status.* The circumstances under which a staff member is expected to perform services for an LEA on an as-needed basis.

G6123.01 Days Willing to Work. The number and/or specified days per week that the substitute employee is willing to work.

G6123.02 Time Willing to Work. The number of hours per day or the specified time period, if less than the normal school day, that the substitute employee is willing to work.

G6200 **Current Leave Status.** Data on any legitimate absence of the staff member from duty assignment. The amount of leave allowed, amount of leave accumulated, amount of leave taken, date of leaving, and anticipated date of return should be recorded under the appropriate items.

G6210 *Sick Leave.* Leave permitted staff members for illness.

G6220 *Personal Leave.* Leave permitted staff members for personal reasons, including emergency circumstances.

G6230 *Annual Leave.* Leave which may be taken by the staff member during the school year through authorization. Annual leave is exclusive of sick leave. Some or all accumulated annual leave may or may not be carried forward from one school year to the next, depending upon LEA regulations.

G6240 *Sabbatical Leave.* A leave of absence, following a designated number of consecutive years of service, providing members of the instructional staff with opportunity for self-improvement through activities such as graduate study, occupational experience or training, travel, writing, or recuperation.

G6250 *Military Leave.* Leave, without loss of tenure, allowed a staff member while in the armed forces.

G6260 *Maternity Leave.* Leave, in addition to sick leave, allowed a staff member before and after the birth of a child. (The use of a separate data element for maternity leave is subject to local and State regulations.)

G6270 *Leave Without Pay.* Leave of absence without remuneration.

G6280 *Government-Requested Leave (including jury duty).* Leave permitted a staff member for such government-requested reasons as jury duty.

G6390 *Other Leave.* Leave for reasons other than those listed above. Such leave should be specified.

H.—CAREER DEVELOPMENT

The data in the H series relate to the staff member's performance and growth in his current assignment. In addition to providing an element for evaluation of performance, this dimension describes factors, such as the need for additional training or experience, which bear upon an administrator's decision to promote or transfer the staff member.

H1000 QUALITY OF PERFORMANCE

Data pertaining to the degree of effectiveness with which the staff member functions relative to goals and objectives which are mutually determined and evaluated. There are numerous criteria and methods for evaluation in current use in LEA's; the choice of which criteria and method to use in evaluating various occupational levels of staff members is left to the discretion of the local administrator according to school board policy and State regulation. Examples of evaluation criteria are found in appendix B.

H1100 **Results of Evaluation.** An appraisal of the staff member's performance. Depending upon the evaluation instrument used, this category could contain the results of an evaluation based on goal achievement, statements regarding performance evaluation, or single phrase or word entries. (See appendix B for examples.) Each time the staff member is evaluated (usually annually), the results should be entered in this catetory along with data in H1200 and H1300.

H1110 *In Previous Assignments With Prior Employers.* Evaluation results of performance under prior employment.

H1120 *In Previous Assignments With Present Employer.* Evaluation results of performance under present employment previous to the current year.

H1130 *In Current Assignment.* Evaluation results of performance with present employer for the current year.

H1200 Date of Evaluation. The date on which the results of the staff member's evaluation is recorded.

H1210 *In Previous Assignments With Prior Employers.* Recording date of evaluation results of performance under prior employment.

H1220 *In Previous Assignments With Present Employer.* Recording date of evaluation results of performance under present employment previous to the current year.

H1230 *In Current Assignment.* Recording date of evaluation results of performance with present employer for the current year.

H1300 Name and Title of Person(s) Evaluating. The name(s) and title(s) of the person(s) involved in completing the staff member's appraisal.

H1310 *In Previous Assignments With Prior Employers.* Evaluator(s) of performance under prior employment.

H1320 *In Previous Assignments With Present Employer.* Evaluator(s) of performance under present employment previous to the current year.

H1330 *In Current Assignment.* Evaluator(s) of performance with present employer for the current year.

H2000 DESIGNATION OF POSITIONS TO WHICH STAFF MEMBER COULD BE TRANSFERRED OR PROMOTED

Indication of those positions within the LEA which are within the potential ability level of the staff member by virtue of experience, training, and general overall capability. Potential positions should be described thoroughly, including the job classification (C series) and function/program area (D series).

H2100 First Alternative. The position most likely to utilize fully the capabilities of the staff member, in the opinion of the evaluator(s).

H2200 Second Alternative. The position most likely to be the second alternative in utilizing fully the capabilities of the staff member, in the opinion of the evaluator(s).

H2300 Third Alternative. The position most likely to be the third alternative in utilizing fully the capabilities of the staff member, in the opinion of the evaluator(s).

H3000 READINESS FOR SUCCESSFUL PERFORMANCE IN ASSIGNMENT OF GREATER RESPONSIBILITY

The degree to which the staff member's capabilities would permit successful performance in an assignment of greater responsibility.

H3100 Immediately. Ready for greater responsibility or assignment of broader scope immediately. Administration should take whatever action is necessary to utilize fully the staff member's ability.

H3200 Near Future. Ready for greater responsibility in the near future (0-1 year) with considerable likelihood that the staff member will perform well.

H3300 Intermediate Future. Ready for greater responsibility in the intermediate future (1-3 years) with considerable likelihood that the staff member will perform well.

H3400 Not Ready but Performs Satisfactorily. Not ready for a future move but performs satisfactorily in current position.

H4000 CAREER DEVELOPMENT NEEDS

Description of the exposure and preparation required by the staff member to be ready for a specified future assignment.

H4100 No Preparation or Additional Experience Required. No requirement of further preparation prior to staff member's assumption of a specified future assignment.

H4200 Job Specialization Required. Requirement of exposure to a job of a specialized nature which

would provide specific experience valuable to the staff member's development.

H4300 Job Rotation Required. Requirement of exposure to one or more jobs which would provide overall experience valuable to the staff member's development.

H4400 Task Assignment Required. Requirement of exposure, along with other staff members, to a temporary task which would provide experience valuable to the development of the staff member.

H4500 Formal Preparation Required. Requirement of attendance at formalized training which would provide information or exposure valuable to the staff member's development.

H4510 *Type of Preparation.* Description of the kind of formal training (e.g., courses, seminars, institutes) recommended for the staff member's development.

H4520 *Location of Preparation.* The location where the recommended training would take place (e.g., within the LEA, at an outside firm, or at an educational institution).

H4530 *Duration of Preparation.* The length of time in days or months, as appropriate, that the recommended training would probably require.

H4540 *Funding of Preparation.* The source of funds to pay for the recommended training (e.g., whether the source is the staff member, the LEA, or some other agency or organization).

H9000 OTHER CAREER DEVELOPMENT INFORMATION

I.—SEPARATION

Separation involves the severance of the employment relationship between the staff member and the LEA. This dimension is used to detail the conditions under which the staff member and the LEA terminate their employment relationship. (In the case of discharge, it is extremely important that the local administrator comply with State and local regulations regarding procedures and documentation.) The categories of voluntary and involuntary separation are subdivided into specific reasons for termination which may provide valuable data for personnel administration. Data on the staff member's eligibility for reemployment are also maintained for future planning purposes.

I1000 TYPE OF SEPARATION

The basic types of separation which can occur in an LEA.

I1100 Voluntary Separation (Resignation). Separation resulting from a decision made solely by the staff member. This class of separation is commonly referred to as "resignation."

I1200 Involuntary Separation. Separation resulting from a decision made solely by the LEA after due process.

I1300 Separation by Mutual Agreement. Separation resulting from a decision arrived at jointly by both the staff member and the LEA.

I1400 Separation by Death. Separation resulting from death of a staff member.

I1500 Retirement. Separation resulting from a staff member leaving the LEA in accordance with the provision of a specific program allowing or requiring a staff member to leave upon reaching a certain age, a certain number of years of service, or upon sustaining a disability.

I2000 REASON FOR SEPARATION

The reason for termination of the employment relationship. In the case of voluntary separation, the reason is usually supplied by the departing staff member. The local administrator should supply the appropriate data in case of involuntary separation. Details of retirement are usually maintained by the retirement agency generally an agent of the State.

I2100 Voluntary Separation. This category may be subdivided and expanded as necessary at the discretion of the local administrator. The following are a few of the many possible elements in this category.

I.–SEPARATION (Continued)

I2110 *To Seek Other Employment.*

I2120 *To Accept Other Employment.*

I2130 *To Engage in Formal Study or Research.*

I2140 *For Marriage.*

I2150 *For Illness.*

I2160 *For Personal Reasons.*

I2170 *No Known Reason.*

I2300 **Involuntary Separation.** The following are the possible reasons for a staff member's termination on an involuntary basis. Others may be added as needed.

I2310 *Layoff.* Separation resulting from largely economic factors which no longer require the existence of the staff member's position.

I2311 *Budgetary Reduction.*

I2312 *Organizational Restructuring.*

I2313 *Decreased Workload.*

I2320 *Discharge.* Separation resulting from the manner in which the staff member has conducted himself. There are many possible specific causes for discharge which could come under this element; the division into subelements is limited only the the detail to which the local administrator needs these data and the ability to collect, maintain, and use them. The following are a few of the many possible elements in this categ y.

I2321 *Not Suited for Present Position.*

I2322 *Commission of Serious and/or Continuing Acts Involving Misconduct, Insubordination, Negligence, Infraction of Law or Regulation, or the Like.*

I2323 *Continued Absence or Tardiness.*

I2324 *Falsified Application Form.*

I2325 *Tenure Not Being Granted.*

I2326 *Unsatisfactory Work Performance.*

I2340 *Location of Discharge Documentation (if other than staff files).* The location, if other than staff files, where the written documentation of staff discharge proceedings are kept (e.g., in a locked vault of specified location; at court, if impounded).

I3000 ELIGIBILITY FOR REEMPLOYMENT

The degree of satisfaction with staff member's past performance.

I3100 **Eligible for Reemployment.** The LEA would have no reservations about reemploying the former staff member in a position for which he is qualified.

I3200 **Not Eligible for Reemployment.** The LEA would not rehire the former staff member.

I3300 **Eligible for Reemployment on a Conditional Basis.** The LEA would rehire the former staff member provided certain conditions could be met.

I4000 DATE OF SEPARATION

The month, day, and year on which the staff member's employment terminates.

Chapter 6

UNITS OF MEASURE

Scientific management, for many major decisions, depends on quickly calculated ratios and measures as indicators of status and/or change. The U.S. Department of Commerce has such indexes as gross national product, cost of living, and balance of payments; in the field of agriculture, indexes include crop yield, commodity futures, and livestock production. In other fields there are similar ratios and measures.

In education, a common measure is the number of pupils or students to be served. Indicators of status or need are sometimes based on pupils per teacher or group of teachers, pupils per learning space, pupils per staff member (teaching or nonteaching), and pupils per school. In this handbook, the concern is optimum staffing of an LEA or a school. The problem is to maximize the process of matching the knowledge and skills needed with those possessed by staff employed. In other words, effective staff administration includes careful, systematic assignment of teachers to pupils, teacher aides to pupils, counselors to pupils, and should result in the proper ratios of teacher aides and teaching assistants to teachers, supporting services staff to teachers, and technological devices (equipment) to staff and pupils.

In addition to suggesting some sample pupil-to-staff and staff-to-staff ratios, this chapter describes some procedures for counting staff members, assignments, and equipment, and defines full-time equivalency, staff retention rate, staff separation rate, and resource mix of staff.

A measure related to school staff is any quantitative information concerning staff of an LEA or other reporting unit (e.g., a school, an intermediate administrative unit, or a State) which can be expressed in terms of its relation to other definable units such as equipment, pupils, cost, and time. Measures involving staff can be compared when they:

- Are based on standardized information
- Apply to comparable administrative units (e.g., schools, LEA's, intermediate administrative units, or States)
- Have the same time application
- Are related to the same definable units such as pupil membership or actual salaries paid
- Are computed by the same process

Some units of measure are defined below. Some examples are presented to suggest standard techniques for making decisions in staff analysis and staff accounting.

STAFF QUANTITATIVE UNITS

Some useful quantitative measures of staff include counting staff as individuals, counting assignments of staff members, enumerating the number of full-time equivalencies of staff, and determining the average length of service and the average salary of the various types of staff.

Staff Counts

When counting staff members for reporting or analysis, each staff member is counted as 1.0 individual. In this handbook, a staff member is never counted as a fraction of 1.0 regardless of the circumstances of his or her employment or assignment.

The following are examples of some of the different ways of counting staff members (each counted as 1.0 whether full-time or part-time):

- Number of staff members employed
- Number of staff members assigned to teach
- Number of staff members assigned to any other particular activity
- Number of full-time staff members
- Number of part-time staff members.

Assignment Counts

An assignment is the activity or group of activities which a staff member is required to perform. The most common types of assignments are listed and defined in chapters 4 and 5 of this handbook. An assignment is either full time or part time (less than full time). A full-time assignment is counted as 1.0 and a part-time assignment is counted as a fraction of 1.0 (usually in tenths) to indicate its equivalency to a full-time assignment.

Full-Time Equivalency of Assignments

A staff accounting system should provide not only for classifying the services performed by each staff member, but also for recording the amount of time normally required of a staff member to perform each assignment. Both these requirements can be met when the full-time equivalencies are recorded for each assignment made to a staff member. Full-time equivalencies are essential for evaluation of staff services, factual reporting about staff members, a better understanding of educational services, and comparison of staff information and measures.

Full-time equivalency of assignment is the amount of time normally required of a staff member to perform a part-time assignment in proportion to that normally required to perform the same assignment full time. (The number 1.0 represents one full-time assignment.) Full-time equivalency is derived by dividing the amount of time required in the part-time assignment by the amount of time required in a corresponding full-time assignment. This measure of time is usually expressed as a decimal fraction to the nearest tenth.

Information about the total employed time of a staff member, regardless of assignment, is obtained through entries under G6100, "Current Service Status." In addition, this handbook recommends that entries which show full-time equivalency of assignments be made under the appropriate data elements in which the assigned activities of the staff member are classified.

The following examples are given to illustrate selected assignment classifications in terms of full-time equivalency of assignments:

- *Program (Service Area).* A full-time staff member is assigned duties as a teacher aide one-half of the day and as a secretary to the superintendent of schools one-half of the day. An entry is made to show that the assignment of the staff member by program (service area) is 0.5 for "Executive Administration Services" (D2320) and 0.5 for "Instruction" (D1000).

- *Subprogram (Area of Responsibility).* A part-time staff member, employed for half days only throughout the regular school term, is assigned duties as a cook. An entry is made to show that the assignment of the staff member by subprogram (area of responsibility) is 0.5 for "Food Preparation and Dispensing Services" (D2562).

- *Job Classification.* A part-time staff member fully qualified as a teacher and employed half days during the entire regular school term, is assigned duties as a kindergarten teacher. An entry is made to show that the assignment of the staff member by job classification is 0.5 for "Professional–Educational" (C2005).

- *Job Classification.* A staff member who is a master mechanic but who has not completed professional training as a teacher, is assigned duties, half-time, as a teacher of mechanics in a high school. An entry is made to show that the assignment of the staff member by job classification is 0.5 under the "Technical" category of "Assistant Teaching Assignment" (C4012).

- *Activity Assignment.* A full-time staff member is assigned duties as principal of a school 60 percent of the time and as a teacher 40 percent of the time. An entry is made to show that the assignment of the staff member by activity assignment is 0.6 for "Principal Assignment" (C1008) and 0.4 for "Teaching Assignment" (C2005).

- *Scope of Assignment.* A full-time staff member is assigned duties as a music teacher in a single school 50 percent of the time and as a systemwide music consultant 50 percent of the time. An entry is made to show that the assignment of the staff member by scope of assignment is 0.5 for "Single Operational Unit" (F1140) and 0.5 for "Systemwide" (F1120).

- *Subject Matter Area.* A full-time staff member is assigned duties teaching English 40 percent of the time and teaching social studies 60 percent of the time. An entry is made to show that the assignment of the staff member by subject matter area is 0.4 for "English Language Arts" (E1005) and 0.6 for "Social Studies/Social Sciences" (E1015).

In addition to determining full-time equivalency of assignments in the current assignment classifications illustrated above, the same determinations can be made to show full-time equivalency of staff assignments by "Location of Current Assignment" (F2200); by grade of pupils served, using that dimension in OE Handbook V; and by medium of instruction and instructional

level, using those dimensions in OE Handbook VI.

The above examples illustrate how the full-time equivalency of each assignment to a staff member can be established according to classifications of the assigned activities. A recognition of the full-time equivalency of assignments is basic to many uses of staff information in staff evaluation and personnel management. Used in combination with other staff information, it can provide an accurate assessment of staff utilization. It permits valid applications of measures involving staff, and it can reflect in necessary detail the services provided by the staff members of the LEA.

When the full-time equivalency of each assignment to a staff member is determined, activities which are incidental to the full-time or part-time assignment should be considered as part of the assignment. A staff member, for example, who has assigned activities which clearly constitute a full-time classroom teaching assignment, may have occasional duties, such as supervising playground or lunchroom, which are incidental to the full-time classroom teaching assignment. To record such incidental activities on a full-time equivalency basis, thus reducing the classroom teaching duties to a part-time assignment, would defeat the purpose of determining the full-time equivalency of staff member assignments.

If, however, a staff member has duties which clearly reduce the time to be given to an assignment, such duties should be recognized as constituting a separate assignment for which a full-time equivalency is determined. For example, a staff member who has a part-time classroom teaching assignment in order to serve as a librarian has two part-time assignments—one as a classroom teacher and one as a librarian. Each assignment should be recorded according to its equivalency of a full-time assignment.

It is possible for a staff member as 1.0 individual to perform activities which, in total, clearly constitute more than 1.0 full-time assignment. It is also possible for total assignments in terms of full-time equivalency to exceed the count of staff members. For example, a staff member may have a full-time teaching assignment and, in addition, drive a school bus after regular school hours. The staff member is still counted as 1.0 individual, but in terms of counting full-time equivalency of assignments, he may be performing activities for the LEA which total 1.5. In such a case, the staff records should indicate that the staff member has a "Teaching Assignment" with a full-time equivalency of 1.0 and a "Vehicle Operating Assignment" with a full-time equivalency of 0.5. The staff accounting system will then accurately reflect the services performed by the staff member.

Average Length of Service

For any identified group of staff members currently employed, the average length of their service as staff members in the LEA is the sum of the total number of years each has been employed (see G1220, "Number of Years Employed in LEA") divided by the number of staff members in the identified group, each counted as 1.0.

Salary

Annual Salary. An employee's annual salary is the total amount of money paid by the employer for services performed over a 12-month period. When analyzing salary data, "contract salary" and "salary paid" must be taken into consideration. "Contract salary" is the amount specified in the employee's contract for identified duties or assignments and may be the total salary paid. "Salary paid," constituting the total money paid during the year, however, may not be the same as the contract salary. When the total salary paid differs from the contract salary, the employee usually receives additional pay not specified in the contract. As an example, a staff member is employed by contract as a teacher but has an additional duty of driving a school bus. In this case, the salary paid is the contract salary plus the salary for the extra duty.

Average Annual Contract Salary. This is the amount derived by dividing the sum of the annual contract salaries of an identified group of staff members by the number of staff members in the group (using the full-time equivalency if part-time staff members are involved).

Average Annual Salary Paid. This is the amount derived by dividing the sum of the total salaries paid to staff members in an identified group by the number of staff members in the group (using the full-time equivalency if part-time staff members are involved).

STAFF RATES

Two units of measure frequently used in staff acounting are "staff retention rate" and "staff separa-

tion rate." "Staff retention rate" is the percentage of staff members who remain employed from one period of time to the next. The "staff separation rate" is the percentage of staff members leaving an LEA or a school during a period of time.

Staff Retention Rate

This rate is determined for an identified group of staff members by dividing the number of staff members remaining for the next successive period by the number of staff members at the beginning of the period, plus any staff members added for new positions, and minus any staff members lost by job abolishment. The result is expressed as a percent. The following formula may be used:

$$R = \frac{r}{b + a - 1}$$

Where,

R = retention rate, expressed as a percent
= the number of staff members remaining for the successive period
= the number of staff members at the beginning of the period
= the number of staff members added for new positions
= the number of staff members leaving for job abolisment

The retention rate may also be calculated by subtracting the separation rate from 100. If the separation rate is 20 percent, then the retention rate is 80 percent.

Staff Separation Rate

This rate is determined for an identified group of staff members for a period of time by dividing the number of staff members replaced before the beginning of the successive period by the number in the group at the beginning of the period, plus those added because of added assignments, minus the number leaving and not being replaced. The following formula may be used in calculating the rate:

$$S = \frac{r}{b + a - 1}$$

Where,

S = separation rate
r = number of staff members replaced before beginning of next period
b = number of staff members at beginning of period
a = number of staff members added because of added assignments
1 = number of staff members leaving the LEA without being replaced

The separation rate may also be calculated by subtracting the retention rate from 100. If the retention rate is 80 percent, then the separation rate is 20 percent.

STAFF RATIOS

Other units of measure important in staff analysis are staff ratios. A ratio is the number of a given type of staff member in relation to another type, in relation to equipment, or in relation to pupils. A ratio can encompass any relationship involved in the teaching process. Ratios described in this section include staff-to-staff ratios, staff-to-pupils ratios, and resource mix per pupil.

Staff-to-Staff Ratios

Staff are employed at various skill levels under three separate functions: D1000 "Instruction," D2000 "Supporting Services," and D3000 "Community Services." The skill levels are identified as C1000 "Official/Administrative," C2000 "Professional—Educational," C3000 "Professional—Other," C4000 "Technical," C5000 "Office/Clerical," C6000 "Crafts and Trades," C7000 "Operative," C8000 "Laborer," and C9000 "Service Work."

Staff-to-staff ratios are determined by dividing the full-time equivalency of staff members in an identified group by the full-time equivalency of staff members in another group. Examples of staff-to-staff ratios are:

- "Professional-Educational" staff (C2000) to "Technical" staff (C4000) assigned to "Instruction" (D1000)
- "Professional-Educational" staff (C2000) to "Professional-Other" staff (C3000)
- "Official/Administrative" staff (C1000) other than "Board of Education" (C1005) and "Tax Assessing/Collecting" (C1011) to "Professional-Educational" staff (C2000)
- "Official/Administrative" staff (C1000) other than "Board of Education" (C1005) and "Tax

Assessing/Collecting" (C1011) to all "Professional" staff (C2000 and C3000)

- "Official/Administrative" staff (C1000) other than "Board of Education" (C1005), "Tax Assessing/Collecting" (C1011), "Assistant Principal" (C1004), and "Principal" (C1008) to all other staff assigned to "Instruction" (D1000) and "Supporting Services" (D2000), other than "Support Services-General Administration" (D2300), "Community Services" (D3000), and "Debt Services" (D5000)
- "Teaching" (C2005) to "Teaching Assistants" (C4012) and "Teaching Aides" (C5005)
- "Teaching" (C2005) to "Teaching Assistants" (C4012)
- "Teaching" (C2005) to "Teaching Aides" (C5005)
- "Teaching" (C2005) to "Remedial Specialists" (C2004)
- "Instructional" staff ["Teaching" (C2005), "Remedial Specialists" (C2004), "Teaching Assistants" (C4012), "Teaching Aides" (C5005), "Student Teaching" (C4010), and "Teaching Interns" (C4013)] to "Supporting Services" staff ["Pupils" (D2100) and "Instructional Staff" (D2200)]
- "Professional-Educational" staff (C2000) of "Supporting Services-Pupils" (D2100) and "Instructional" staff (D2200) to "Professional-Other" staff of "Supporting Services-Pupils" (D2100) and "Supporting Services-Instructional Staff" (D2200)
- "Instructional" staff [assigned to "Instruction" (D1000)] to "Supporting Services" staff [assigned to (D2000)]
- "Instructional" staff (assigned to D1000) to "Supporting Services" staff (assigned to "Pupils" [D2100) and "Instructional Staff" (D2200)]
- "Instructional" staff (assigned to D1000) to "Support Services-School Administration" (D2400)
- "Instructional" staff (assigned to D1000) to "Support Services-Instructional Staff" (D2200)
- "Instructional" staff (assigned to D1000) to "Educational Media" staff (D2220)
- "Instructional" staff (assigned to D1000) to "School Library Services" staff (D2222)
- "Instructional" staff (assigned to D1000) to "Audiovisual Services" staff (D2223)
- "Instructional" staff (assigned to D1000) to "Educational Television Services" staff (D2224)
- "Instructional" staff (assigned to D1000) to "Computer-Assisted Instructional Services" staff (D2225)
- "Instructional" staff (assigned to D1000) to "Improvement of Instruction Services" staff (D2210)
- "Instructional" staff (assigned to D1000) to "Planning, Research, Development, and Evaluation Services" staff (D2620)

Staff-to-Pupils Ratios

Two types of pupil units are used in establishing staff-to-pupils ratios—average daily membership (ADM), and pupils in attendance for a particular day (APD). The APD unit is used for a staff-to-pupils ratio for a particular day and the ADM unit is used for a longer period of time, usually a term or year. These ratios are determined by dividing the number of staff members in an identified group by the number of pupils served by that group, using the appropriate pupil unit. Full-time equivalency is to be used for part-time staff members.

When calculating the ADM for kindergarten and nursery pupils attending half-day sessions, it is necessary to treat the attendance as half days. The ADM is determined by dividing the aggregate half days in membership for a period by the number of half days in the period.

Listed below are some examples of staff-to-pupils ratios:

- Teacher ("Teaching Assignment," 2005)-to-pupils ratio
- Teacher assistant ("Teaching Assistant Assignment," C4012)-to-pupils ratio
- Teacher aide ("Teaching Aide Assignment," C5005)-to-pupils ratio
- Instructional staff ("Teaching Assignment," C2005; "Teaching Assistant Assignment," C4012; "Teaching Intern Assignment," C4013; and "Teaching Aide Assignment," C5005)-to-pupils ratio
- Counselor ("Counseling Assignment," C2002)-to-pupils ratio
- Principal ("Principal Assignment," C1008)-to-pupils ratio
- Media services ("Librarian/Media Assignment," C2003)-to pupils ratio
- Professional educational staff ("Professional-Educational" job classification, C2000)-to-pupils ratio
- All staff-to-pupils ratio
- Professional educational staff ("Professional-Educational" job classification, C2000) per 1,000 pupils ratio

- Pupil support staff (staff assigned to function D2100)-to-pupils ratio
- Instruction staff (staff assigned to function D1000)-to-pupils ratio
- Supporting services staff (staff assigned to function D2000)-to-pupils ratio.

Resource Mix Per Pupil

The state of the art of instruction today is such that there is a recognized need for a variety of skills and techniques to provide for challenging and exploratory learning experiences necessary to educate self-pacing pupils. No longer can a teacher alone provide this environment appropriately. A variety of staff-member skills accompanied by the technological techniques available today make it possible for the teacher to be left to make diagnostic and evaluative decisions regarding learners. Historically, phonographs, radio, motion pictures, and television have had significant effects on the art of instruction. Furthermore, the entrance of computers and individualized instructional equipment have further enhanced the combined staff and technological competencies constituting the resource mix.

The resource mix, then, can be defined as the combined skills of a team of staff members, with varying levels of skills, and technologies of equipment and supplies necessary to provide the learning environment required to accomplish the individual objectives of the learners involved. The average resource mix per pupil is derived by determining the sum of the cost of the staff members involved and the cost of the equipment and supplies used and dividing this sum by the number of pupils involved. The following formula may be used:

$$\text{Resource mix} = \frac{\text{total cost of staff and equipment}}{\text{number of pupils}}$$

$$R = \frac{x + y + z + a + b + \ldots + n}{p}$$

Where,

- R = resource mix
- x = annual cost of teacher(s)
- y = annual cost of teaching assistant(s)
- z = annual cost of teaching aide(s)
- a = annual cost of a particular type of equipment
- b = annual cost of another particular type of equipment
- n = annual cost of all other types of equipment
- p = number of pupils involved

The effectiveness of a resource mix is determined by dividing the increase in pupil achievement (usually quantified in average test scores) by the total cost per pupil (resource mix), and dividing the result by the total number of weeks. The effectiveness ratio formula is:

$$\text{Cost effectiveness} = \frac{\text{average increase in test scores}}{\frac{\text{resource mix}}{\text{time in weeks}}}$$

$$CR = \frac{S}{\frac{R}{T}}$$

Where,

- CR = cost effectiveness ratio
- S = average increase in scores
- R = resource mix cost
- T = time (number of weeks involved)

APPENDIXES

Appendix A. U.S. OFFICE OF EDUCATION PUBLICATIONS (Other Than SERR Series) REFERENCED IN THIS HANDBOOK

Appendix B. EXAMPLES OF CRITERIA FOR EVALUATION OF STAFF MEMBERS' JOB PERFORMANCE

Appendix C. GLOSSARY

Appendix D. AFTERWORD

Appendix E. ACKNOWLEDGMENTS

Appendix A

U.S. OFFICE OF EDUCATION PUBLICATIONS (Other Than the SERR Series) REFERENCED IN THIS HANDBOOK

The following U.S. Office of Education publications, referenced in the handbook, are available to the local administrator who wants more specific definitions of undergraduate and graduate degrees or who wants more detailed coding for the data elements concerning fields of study and institutions of higher education:

- A coding of all U.S. higher education institutions for use under "Name" (of Educational Institution Attended) (B1121) and "Name of Educational Institution at Which Degree Was Earned" (B1132):

  Education Directory, 1973-74: Higher Education, published in 1974 by the Office of Education, U.S. Department of Health, Education and Welfare. (For sale by the Superintendent of Documents, Stock No. 1780-01272, U.S. Government Printing Office, Washington, D.C. 20402. Price: $5.30.)

- A more detailed explanation of criteria to be met for undergraduate and graduate degrees, for use in collecting data on "Degrees and Certificates Earned" (B1130):

  Earned Degrees Conferred (1970-71), published in 1972 by the Office of Education, U.S. Department of Health, Education and Welfare. (For sale by the Superintendent of Documents, Catalog No. HE 5.254:54013-70, U.S. Government Printing Office, Washington, D.C. 20402. Price: 50 cents.)

- A coding of fields of study, for use under "Major" (B1141) and "Minor" (B1142):

  A Taxonomy of Instructional Programs in Higher Education, published in 1970 by the Office of Education, U.S. Department of Health, Education and Welfare. (For sale by the Superintendent of Documents, Catalog No. HE 5.250:50064, U.S. Government Printing Office, Washington, D.C. 20402. Price: 45 cents.)

Appendix B

EXAMPLES OF CRITERIA FOR EVALUATION OF STAFF MEMBERS' JOB PERFORMANCE

EXAMPLE 1

Performance Level 1

Performance is excellent. Results attained are of major importance to the achievement of the system's goals and objectives. Staff member makes highly productive use of human, physical, and financial resources and time. Skill in managing or influencing the work of others is most effective. Accomplishments show a superior degree of creativity, initiative, and resourcefulness. Methods used indicate a high level of professional competence.

Performance Level 2

Performance is very acceptable. Results attained are of considerable importance to the achievement of the system's goals and objectives. Staff member makes clearly productive use of human, physical, and financial resources and time. Skill in managing or influencing the work of others is generally effective. Accomplishments show a better than normal degree of creativity, initiative, and resourcefulness. Methods used indicate an above average level of professional competence.

Performance Level 3

Performance is satisfactory. Results attained are necessary to the achievement of the system's goals and objectives. Staff member makes moderately productive use of available human, physical, and financial resources and time. Skill in managing or influencing the work of others is of variable effectiveness. Accomplishments show a normal degree of creativity, initiative, and resourcefulness. Methods used indicate an average level of professional competence.

Performance Level 4

Performance is marginal. Results attained have not contributed significantly to the achievement of the system's objectives. Staff member makes less than average use of available human, physical, and financial resources and time. Ability and skill in managing or influencing the work of others lack effectiveness. Accomplishments show a limited degree of creativity, initiative, and resourcefulness. Methods used indicate a below average level of professional competence.

Performance Level 5

Overall performance is unsatisfactory.

EXAMPLE 2

For each of the characteristics listed below, the staff member could be rated as "outstanding," "very high," "above normal," "normal," "below normal," "very low," "unsatisfactory," or "not applicable."

A. Performance Traits

1. *Quantity*—Volume, speed, output.
2. *Quality*—Accuracy, thoroughness, effectiveness.
3. *Knowledge of Position*—Extent of information and understanding possessed by staff member in his particular field.
4. *Initiative*—Extent to which staff member is a "self-starter" in attaining work objectives.
5. *Adaptability*—Ability to learn new duties and adjust to new situations.

B. Personal Traits

1. *Dependability*—Extent to which staff member

can be depended upon to report on time, stay on job, carry out instructions.

2. *Attitude*–Behavior regarding total work situation, including interest, enthusiasm, cooperation given others, tactfulness, loyalty, ability to get along with coworkers and superiors.
3. *Personal Effectiveness*–Sustained effort, assumption of responsibility, telephone manner, ability to communicate.
4. *Personal Appearance*–Grooming and personal cleanliness, judgment and taste in clothing (if applicable).

C. Overall Rating of Staff Member In Present Level of Responsibility

D. Comments and Observations

1. *Strong Points* _____

_____

2. *Weak Points* _____

_____

EXAMPLE 3

In some LEA's, the tasks specified in staff members' assignments are expanded by establishing goals and objectives to be fulfilled. These objectives are formulated in measurable terms. That is, they show specific activities to be done or specific types of behavior or knowledge to be demonstrated by pupils, in designated time frames. Measurable objectives should be mutually developed by the supervisor and the person being supervised. Pupils can be involved in developing objectives for the instructional staff. These objectives become the bases on which performance is evaluated. The supervisor and the staff member agree at the end of the designated period on the extent to which the objectives have been fulfilled. This extent is recorded.

Such performance ratings would bear the signatures of the staff member and the supervisor.

Appendix C

GLOSSARY

This section contains definitions of selected terms *as used in this handbook* and definitions of some additional terms necessary for a common understanding of LEA accounting systems. Extensive use of the glossary will help establish a high degree of comparability in LEA records and reports. The glossary is arranged alphabetically with appropriate cross-referencing.

Some of the definitions have been taken from Handbooks I,[1] IIR,[2] III,[3] IV,[4] VR,[5] VI,[6] and VII[7] in the *State Educational Records and Reports Series.* In such cases, the definition used in this handbook is taken from the latest handbook in which the term is defined. Where a definition has been modified, the handbook reference is given; e.g., I, IIR, III, IV, VR, VI, and VII, followed by the letter "M".

[1] Paul L. Reason, Emery M. Foster, and Robert F. Will, *The Common Core of State Educational Information.* State Educational Records and Reports Series: Handbook I, Bulletin 1953, No. 8. Office of Education, U.S. Department of Health, Education, and Welfare, Washington, D.C.: U.S. Government Printing Office, 1953.

[2] Charles T. Roberts and Allan R. Lichtenberger, *Financial Accounting Classifications and Standard Terminology for Local and State School Systems.* State Educational Records and Reports Series: Handbook II, Revised, No. 73-11800. Office of Education, U.S. Department of Health, Education, and Welfare, Washington, D.C.: U.S. Government Printing Office, 1973.

[3] Paul L. Reason and George G. Tankard, Jr., *Property Accounting for Local and State School Systems.* State Educational Records and Reports Series: Handbook III, Bulletin 1959, No. 22. Office of Education, U.S. Department of Health, Education, and Welfare, Washington, D.C.: U.S. Government Printing Office, 1959.

[4] Allan R. Lichtenberger and Richard J. Penrod, *Staff Accounting for Local and State School Systems.* State Educational Records and Reports Series: Handbook IV, Bulletin 1965, No. 18. Office of Education, U.S. Department of Health, Education, and Welfare, Washington, D.C.: U.S. Government Printing Office, 1966.

[5] John F. Putnam, "Student/Pupil Accounting." Manuscript, planned for publication in 1974, revising *Pupil Accounting for Local and State School Systems, 1964.* State Educational Records and Reports Series: Handbook V.

[6] John F. Putnam and W. Dale Chismore, *Standard Terminology for Curriculum and Instruction in State and Local School Systems.* State Educational Records and Reports Series: Handbook VI, Bulletin 1970, No. 23052. Office of Education, U.S. Department of Health, Education, and Welfare, Washington, D.C.: U.S. Government Printing Office, 1970.

[7] Yeuell Y. Harris and Ivan N. Seibert, *The State Education Agency.* State Educational Records and Reports Series: Handbook VII, Bulletin 1971, No. 23054. Office of Education, U.S. Department of Health, Education, and Welfare, Washington, D.C.: U.S. Government Printing Office, 1971.

A

Accountability. The capability and the responsibility to account for the expenditure of money and the commitment of other reseources in terms of the results achieved. This involves both the stewardship of money and other resources and the evaluation of achievement in relation to specified goals. (VII)

Accounting. The procedure of maintaining systematic records of events relating to persons, objects, or money and summarizing, analyzing, and interpreting the results of such records. (VII M)

Accounting System. The total mechanism of records and procedures of recording, retrieving, and reporting information on the financial position and operations of a governmental unit or any classifying of its funds, balanced account groups, and organizational components. (IIR)

Administration. The act of managing or directing the activities of an LEA or a portion of these activities.

Administrative Personnel. Staff members on the LEA payroll who are primarily engaged in activities which have as their purpose the general regulation, direction, and control of the affairs of the LEA. (IIB)

Administrative Action. Any action which results in the general regulation, direction, or control of the affirs of the organizational unit. (VII)

Administrative Unit. A unit which exists primarily to operate schools or to contract for school services. Normally, taxes can be levied against such units for school purposes. These units may or may not have the same boundaries as county, city, or town boundaries. (This term is used synonymously with the term "school system," and "LEA.") (IIR)

Administrator. A staff member who has been given the responsibility to manage or direct the activities of an LEA or a portion of these activities.

Adult Basic Education. Learning experiences concerned with the fundamental tools of learning for adults who have never attended school or who have interrupted formal schooling and need this knowledge and these skills to raise their level of education to increase self confidence and/or self determination, to prepare for an occupation, and to function more responsibly as citizens in a democracy. (IIR)

Adult/Continuing Education. Learning experiences designed to develop knowledge and skills to meet immediate and long range educationl objectives for adults who, having completed or interrupted formal schooling, have accepted adult roles and responsibilities. Programs include activities to foster the development of fundamental tools of learning, to prepare for a postsecondary career, to prepare for postsecondary education programs, to upgrade occupational competencies, to prepare for a new or different career, to develop skills and appreciations for special interests, or to enrich the esthetic qualities of life. (IIR)

Aggregate Days Attendance. The sum of the days present (actually attended) of all pupils when school was actually in session during a given reporting period. Only days on which the pupils are under the guidance and direction of teachers should be considered as days in session. See also *Day in Session* and *Day of Attendance.* (IIR)

Aggregate Days Membership. The sum of the days present and absent of all pupils when school was in session during a given reporting period. Only days on which the pupils are under the guidance and direction of teachers should be considered as days in session. See also *Day in Session* and *Day of Attendance.* (IIR)

Area of Responsibility. A subdivision of a service area consisting of activities which, regardless of their nature, have a common purpose directly related to the operational objective of the service area. (IIR)

Assignment. A specific group of activities for which a staff member has been given responsibility.

Assignment Full-Time. The responsibility for a group of activities which require a full-time staff member to perform.

Assignment, Part-Time. The responsibility for a group of activities which do not require the services of a staff member full time.

Associate Degree. A degree commonly conferred upon the successful completion of a 2-year program of studies at a junior college or technical institute. (IV)

Attendance, Aggregate Days. See *Aggregate Days Attendance.*

Audiovisual Aids. Optical, electronic, and other devices—and related supplies—which are designed to enhance learning through the combined senses of hearing and sight; e.g., sound, motion pictures, printed materials, and television. Frequently two or more of these components are combined into electronic distribution systems, some of which incorporate remote or dial access capabilities. See also *Educational Media.* (IIR)

Average Daily Attendance (ADA). The aggregate days attendance of a given school during a reporting period, divided by the number of days school is in session during this period. Only days on which the pupils are under the guidance and direction of teachers should be considered as days in session. The average daily attendance for groups of schools having varying lengths of terms is the sum of the average daily attendances obtained for the individual schools. See also *Aggregate Days Attendance, Day in Session,* and *Day of Attendance.* (IIR)

Average Daily Membership (ADM). The aggregate days membership of a school during a reporting period, divided by the number of days school is in session during this period. Only days on which pupils are under the guidance and direction of teachers should be considered as days in session. The average daily membership for groups of schools having varying lengths of terms is the sum of the average daily memberships obtained for the individual schools. See also *Aggregate Days Membership, Day in Session,* and *Membership.* (IIR)

B

Bachelor's Degree. A degree usually conferred upon the successful completion of a 4-year college program of studies. (II)

Board of Education Services. The activities of the elected or appointed body which has been created according to State law and vested with responsibilities for educational activities in a given geographical area. These bodies are sometimes called school boards, governing boards, boards of directors, school committees, school trustees, etc. This "Service Area" covers State boards, intermediate administrative unit boards, and local basic administrative unit boards. (IIR)

Board Secretary. A person who records the activities of the board of education.

Board Treasurer. A person who keeps financial records of the board of education.

Budget Services. Activities concerned with supervising budget planning, formulation, control, and analysis. (IIR)

Business Support Services. Activities concerned with purchasing, paying, transporting, exchanging, and maintaining goods and services for the LEA. Included are the fiscal, acquisition of facilities, operation and maintenance, and internal services for operating all schools. (IIR)

C

Central Administrative Office. An office or building used primarily for housing equipment and personnel engaged in activities which have as their purpose the general regulation, direction, and control of the affairs of the LEA. These activities are systemwide and are not confined to one school, subject, or narrow phase of school activity. (IIR)

Certificate. The legal document giving authorization from the State (or an agency or organization authorized by the State) to perform services for the LEA. ("Licenses" which meet these criteria should be regarded as "certificates.") (IV)

Certification. The general process by which the State (or an agency or organization authorized by the State) provides a credential to an individual. (IV)

Chart of Accounts. A list of all accounts generally used in an individual accounting system. In addition to account titles, the chart includes the account numbers which have been assigned to each account. Accounts in the chart are arranged with accounts of a similar nature; for example, assets and liabilities. (II B)

Civic Activities. School-related activities such as parent-teacher association meetings and such non-school-related civic activities as public forums, lectures, and civil defense planning usually connected with school services. (IIR)

Clerical Personnel. Staff members performing activities concerned with preparing, transferring, transcribing, systematizing, or filing written communications and records. Included are stenographers and secretaries. (VIIM)

Cocurricular Activities. Cocurricular activities comprise the group of school-sponsored activities, conducted under the guidance or supervision of qualified adults, designed to provide opportunities for pupils to participate, on an individual basis, or in small or large groups, in school events, public events, or a combination of these, for such purposes as motivation, enjoyment, and improvement of skills. In practice, participation usually is not required and credit usually is not given. When participation is required or credit is given the activity generally is considered to be a course. (VIM)

Community/Junior College. An institution of higher education which usually offers the first 2 years of college instruction and career education, grants an associate degree, and does not grant a bachelor's degree. It is either a separately organized institution (public or nonpublic) or an institution which is a part of a public school system or system of junior colleges. Offerings include transfer, occupational, and/or general studies programs at the postsecondary instructional level and may also include adult education programs. (VR)

Community Recreation. Activities concerend with providing recreation programs for the community as a whole, or for some segment of the community, including such staff activities as organizing and supervising playgrounds, swimming pools, and other recreation programs for the community. (IIR)

Community Relations. Activities concerned with maintaining liaison with local civic groups, handling requests for public speaking engagements, responding to public inquiries, and arranging for tours of, and visits to, the LEA. (IIR)

Community Services. Services, other than public school and adult education functions, provided by the school or LEA for purposes relating to the community as a whole or some segment of the community. These include such services as community recreation programs, civic activities, public libraries, programs of custody and care of children, community welfare activities, and services for nonpublic school pupils provided by the public schools on a continuing basis. (IIR)

Comparability. The characteristic of commonality among or between selected elements measured in terms of identical constants. The accuracy of the measurement of the degree of comparability is usually dependent on the number of constants applied. (IIR)

Computer-Assisted Instruction. Programed instruction utilizing an electronic computer as the principal medium of instruction. (IIR)

Consultant. A person who gives professional or technical advice and assistance. A consultant may perform his services under contract (purchased services) or he may be an employee on the payroll of a State agency. (IIR)

Consultants or Supervisors of Instruction. See *Supervisors of Instruction.*

Contracted Services. Services rendered by personnel who are not on the payroll of the LEA, and all related services covered by the contract. (IIR)

Continuing Education. See *Adult/Continuing Education.*

Contributions and Donations From Private Sources. Money received from philanthropic foudations, private individuals, or private organizations for which no repayment or special service to the donor is expected. Separate accounts may be maintained for revenue unrestricted as to use, and revenue which is restricted as to use. (IIR)

Controlling Account. An account, usually kept in the general ledger, in which the postings to a number of identical, similar, or related accounts are summarized so that the balance in the controlling account equals the sum of the balances of the detailed accounts. The controlling account serves as a check on the accuracy of the detailed account postings and summarizes the expenditures in relation to the budget estimates. (IIR)

Cost Accounting. That method of accounting which provides for the assembling and recording of all the elements of cost incurred to accomplish a purpose, to carry on an activity or operation, or to complete a unit of work or a specific job. (IIR)

Cost Benefit Analysis. The process of analysis which provides the means for comparing the resources to be allocated to a specific program with the results likely to be obtained from it; or, analysis which provides the means for comparing the results likely to be obtained

from the allocation of certain resources toward the achievement of alternate or competing objectives. (IIR)

Cost Center. The smallest segment of a program that is separately recognized in the agency's records, accounts, and reports. Program-oriented budgeting, accounting, and reporting aspects of an information system are usually built upon the identification and use of a set of cost centers. (IIR)

Cost Per Pupil. See *Current Expenditures Per Pupil.*

Cost Effectiveness. The process of analysis designed to measure the extent to which resources allocated to a specific objective under each of several alternatives actually contribute to accomplishing that objective, so that different ways of gaining the objective may be compared. (VII)

Cost Unit. The unit of product or service whose cost is computed. (IIR)

Course. An organization of subject matter and related learning experiences provided for the instruction of pupils on a regular or systematic basis, usually for a predetermined period of time (e.g., a semester, a regular school term, or a 2-week workshop). (VII)

Credential. The document issued to a staff member by the State (or an agency or organization authorized by the State) authorizing the holder to perform services for the LEA. "Certificate," "license," or "permit" are examples of terms frequently used interchangeably with "credential." (IV)

Current Expenditures Per Pupil. Current expenditures for a particular period of time divided by a pupil unit of measure. (IIM)

Curriculum. The planned interaction of pupils with instructional content, instructional resources, and instructional processes for the attainment of educational objectives. (VII)

Custody and Care of Children. The custodial care of children in residential day schools or child care centers which are not part of, or directly related to, the instructional program, and where the attendance of the children is not included in the attendance figures for the LEA. (IIR)

D

Data. See *Fact.*

Data Bank. A comprehensive collection of data, usually in machine-usable form (such as punch cards, tapes, and discs), which can be used for such purposes as drawing subsamples for special studies, checking hypotheses not formulated or tested previously, facilitating historical studies, and deriving summations and correlations. Typically, an educational data bank is composed of component files relating to specific areas of information such as pupils, staff, property, finance, instructional programs, and the community. (VII)

Data Processing. The activities of collecting and organizing data, storing for future use, and preparing statistical reports. See also *Machine Data Processing.*

Day in Session. A day on which the school is open and the pupils are under the guidance and direction of teachers in the teaching process. On some days the school plant itself may be closed and the student body as a whole engaged in school activities outside the school plant under the guidance and direction of teachers. Such days should be considered as days in session. Days on which school is closed for such reasons as holidays, teachers' institutes, and inclement weather should not be considered as days in session. (VII)

Day of Attendance. A day of attendance is one in which a pupil is present for the full day under the guidance and direction of a teacher while school is in session. When a pupil is present for only part of the day, it should be considered as a partial day of attendance in the same proportion that his time present at school bears to the total length of the school day. If overcrowded conditions make it necessary to hold two separate sessions with a different group of pupils in each session, a pupil attending for all of either session should be considered as having attended for the full day. An excused absence during examination periods or because of sickness, or for any other reason, should not be counted as a day of attendance. See also *Day in Session.* (VII)

Degree. A title conferred by a college or university as official recognition for the completion of a program of studies or for other attainment. (VII)

Degree, Associate. See *Associate Degree.*

Degree, Bachelor's. See *Bachelor's Degree.*

Degree, Doctor's. See *Doctor's Degree.*

Degree, Master's. See *Master's Degree.*

Development. Activities concerned with the evolving process of utilizing the products of research and considered judgment in the deliberate improvement of educational programs. (VII)

Direct Costs. Those elements of cost which can be easily, obviously, and conveniently identified with specific activities or programs, as distinguished from those costs incurred for several different activities or programs and whose elements are not readily identifiable with specific activities. See also *Indirect Costs.* (IIR)

Direct Services. Activities identifiable with, and directed specifically to, an individual program. Those activities concerned with the teaching-learning process are considered to be direct services for instruction. (IIR)

Doctor's Degree. A graduate degree granted upon the completion of from 2 to 3 years of graduate work and the demonstration of ability in research by a dissertation or other evidence. (IV)

E

Educational TV. Television programs presented as a part of the instructional program of the school or LEA. (IIR)

Educational Media. Any device, content material, method, or experience used for teaching and learning purposes. These include printed and nonprinted sensory materials. See also *Audiovisual Aids.* (VII)

Elementary School. A school classified as elementary by State and local practice and composed of any span of grades not above grade 8. A nursery school or kindergarten school is included under this heading *only* if it is an integral part of a regularly established school system. (IV)

Early Childhood Education. Educational experiences provided by the school at the preprimary and primary levels. (VI)

Elementary Instructional Level. The general level of instruction provided for pupils in elementary schools, and any instruction of a comparable nature and difficulty provided for adults and youth beyond the age of compulsory school attendance. (V)

Employee Benefits. Compensation, in addition to regular salary, provided to an employee. This may include such benefits as health insurance, life insurance, annual leave, sick leave, retirement, and social security. (IIR)

Enrichment Program. Supplementary instructional experiences provided pupils according to their special needs, abilities, and interest. For preschool or preprimary culturally deprived children, this refers to experiences designed to aid in their transition from home to a school environment; emphasis is on language development in preparation for reading instruction; and, frequently, such programs are supplemented by counseling with parents and with home visits by school staff members. For other pupils, such as the gifted, talented, or college bound, this term refers to special instructional experiences provided in addition to instruction generally provided most pupils. (VI)

Equipment. Any instrument, machine, apparatus, or set of articles which (a) retains its original shape and appearance with use and (b) is nonexpendable; i.e., if the article is damaged or some of its parts are lost or worn out, it is usually more feasible to repair it than to replace it with an entirely new unit. (VII)

Evaluation. The process of ascertaining or judging the value or amount of an action or an outcome by careful appraisal of previously specified data in light of the particular situation and the goals and objectives previously established. (VII)

Exceptional Children. Children who, because of certain atypical characteristics, have been identified by professionally qualified personnel as requiring special educational planning and services, whether or not such services are available. In general, the term "exceptional children" considers exceptionality on the basis of (a) physical handicap, (b) emotional and/or social handicap, and (c) measurable exceptionality in mental ability; i.e., mentally gifted and mentally retarded. Some exceptional children have more than one type of exceptionality. (VI)

Exceptional Pupils. Children and adults, identified as exceptional, receiving instruction in a program of special education. (VR)

Exceptionality. A physical, mental, or behavioral characteristic by which technically or professionally qualified personnel identify individuals as significantly deviant in terms of their age group. See also *Exceptional Children.* (VI)

Expenditures. Charges incurred, whether paid or unpaid, which are presumed to benefit the current fiscal year. (IIR)

Expenditure Character. The period of time which the expenditure is presumed to benefit. Character classification of expenditures are current expenditures, capital outlay, and debt service. (IIR)

Extended-Day Sessions. A school day with separate times for different groups of pupils to start and end their sessions in the same school plant; e.g., high school juniors and seniors begin their session at 7:30 a.m. and the freshmen and sophomors begin their session at 8:30 a.m., the session for juniors and seniors ending one hour prior to the time the session ends for the freshmen and sophomores. (VI)

Extended School Day. The part of the calendar day, following the daily session, when school-related activities and recreation are provided pupils by the school. (VI)

Extension Work. Generally, instructional activities other than those connected with the instruction of pupils on the campus. Extension work includes correspondence study, classes for part-time pupils off the campus or at unusual hours on the campus, and similar instructional arrangements. (VI)

Extraclass Activities. See *Cocurricular Activities.*

F

Facility. A piece of land, a building site, a building, or part of a building. (III)

Fact. An event, feat, or piece of information presented as having objective reality. (IIR)

Federal Revenue. Revenue provided by the Federal Government. Expenditures made with this revenue should be identifiable as federally supported expenditures. (IIR)

Federal Aid for Education. Any grant made by the Federal Government for the support of education. See also *Public Grant.* (IIR)

Fidelity Bond. A bond guaranteeing the LEA against losses resulting from the actions of the treasurer, employees, or other persons of the system. See also *Surety Bond.* (IIR)

Financial Accounting. The recording and reporting of activities and events affecting the money of an administrative unit and its program. Specifically, it is concerned (1) with determining what accounting records are to be maintained, how they will be maintained, and the procedures, methods, and forms to be used, (2) with recording, classifying, and summarizing activities or events, (3) with analyzing and interpreting recorded data, and (4) with preparing and initialing reports and statements which reflect conditions as of a given date, the results of operations for a specific period, and the evaluation of status and results of operation in terms of established objectives. (IIR)

Fiscal Period. Any period at the end of which an agency determines its financial condition and the results of its operations and closes its books. It is usually a year, though not necessarily a calendar year. The most common fiscal period is from July 1 through June 30. (IIM)

Fiscal Services. Activities involved with managing and conducting the fiscal operations of the LEA. This "Service Area" includes budgeting, receiving and disbursing, financial accounting, payroll, internal auditing, and purchasing. (IIR)

Fixed Assets. Land, buildings, machinery, furniture, and other equipment which the LEA intends to hold or continue in use over a long period of time. "Fixed" denotes probability or intent to continue use or possession, and does not indicate immobility of an asset. (IIR)

Food Delivery. Delivery of prepared food, ready for serving, within the LEA. (IIR)

Food Preparation and Dispensing Services. Preparation and serving of regular and incidental meals, lunches, or snacks in connection with school activities. It includes cooking, operating kitchen equipment, preparing salads, serving food, cleaning dishes, and storing dishes and kitchen equipment. (IIR)

Food Services. Activities involved with the food services program of the school or LEA. This service area includes the preparation and serving of regular and incidental meals, lunches, or snacks in connection with school activities, and the delivery of food. (IIR)

Food Service Fund. The accounting entity for financial transactions related to food service operations. (IIR)

Full-Time Equivalency. The amount of time for a less-than-full-time activity divided by the amount of time normally required in a corresponding full-time activity. Full-time equivalency usually is expressed as a decimal fraction to the nearest tenth. (VIM)

Full-Time Staff Member. A staff member whose total current assignments, regardless of their classification, require his or her services each working day for at least a number of hours equal to the number of hours of a regular working day. (VII)

Function. An action which contributes to a larger action of a person, living thing, or created thing. (IIR)

Fund. An independent accounting entity with its own assets, liabilities, and fund balances. Generally, funds are established to account for financing of specific activities of an agency's operations. (IIR)

G

General Administration. Those activities involved in the overall general administrative responsibility for the entire LEA. (IIR)

General Fund. The accounting entity for all transactions which do not have to be accounted for in another fund. It is used to account for all ordinary operations of an LEA. (IIM)

General Ledger. A book, file, or other device in which accounts are kept to the degree of detail necessary, summarizing the financial transactions of the LEA. General ledger accounts may be kept for any group of receipt or expenditure items on which an administrative officer wishes to maintain a close check. (IIR)

Grants-in-Aid. Contributions made by a governmental unit to an LEA which are not related to specific revenue sources of the respective governmental unit, or if related to specific revenue sources of the governmental unit, are distributed on some flat grant or equalization basis. Grants-in-aid are made by intermediate governments, State Governments, and the Federal Government. (IIR)

Guidance Personnel. Persons who have been assigned specific duties and school time to carry on recognized functions of guidance programs in whole or in part. Included are counselors, deans, placement counselors, guidance specialists, and similar personnel (both certificated and noncertificated). (IIRM)

H

Health Personnel. Persons in the field of physical and mental health, such as physicians, psychiatrists, school nurses, dentists, dental hygienists, psychiatric social workers, and therapists, whose services, though directed primarily at individuals, are sometimes used for group activities. (IIR)

High School Diploma. A formal document certifying the successful completion of a secondary school program of studies. (IV)

Higher Education. Education above the instructional level of the secondary school, usually beginning with grade 13, which is provided by colleges, universities, graduate schools, professional schools, and other degree-granting institutions. (VII)

Homebound Pupil. A pupil who is unable to attend classes and for whom instruction is provided at home by a teacher. (VR)

Human Rights. The right of the individual to be free from discrimination because of race, ethnic background, religion, or sex in any aspect of employment or social relationships. (VIIM)

I

Identification Number. A number assigned to a staff member by an LEA or State agency for identification and record keeping purposes. These include such

numbers as payroll number, employee number, health plan number, and retirement system number.

Indirect Services. Services which cannot be identified with a specific program. All support services are indirect services of instruction programs. (IIR)

Indirect Expenses. Those elements of cost which are of such nature that they cannot be readily or accurately identified with a specific service. For example, the custodial staff may clean corridors in a school building which is used jointly by administrative, instructional, maintenance, and attendance personnel. In this case, a part of custodial salaries is an indirect expense of each service using the corridors. However, it is impossible to determine readily or accurately the amount of the salary to charge each of these services. See also *Direct Expenses.* (IIR)

Inservice Education or Training. A program of systematized activities promoted or directed by the education agency, or approved by the education agency, contributing to the professional or occupational growth in competence of staff members during the time of their service to the agency. College credit programs are not regarded in this handbook as inservice education or training. (VIIM)

Institutional. Pertaining to an organization having a social, educational, or religious purpose, such as a school, church, hospital, or reformatory. (VII)

Instruction. Activities dealing directly with the teaching of pupils. Instruction may be provided for pupils in a school classroom, in another location such as a home or hospital, and other learning situations such as those involving cocurricular activities; it may also be provided through some other approved medium such as television, radio, telephone, and correspondence. (IIR)

Instruction by Correspondence. Approved instruction, usually received by the pupil outside the school plant, which provides for the systematic exchange between teacher and pupil of materials sent by mail. (VR)

Instruction for Homebound Pupil. Individual instruction by a teacher usually at the home of a pupil who is unable to attend class. (VI)

Instructional Level. An indication of the general nature and difficulty of instruction; e.g., elementary instructional level, secondary instructional level, and postsecondary instructional level. (VII)

Instructional Organization. A school or other organizational arrangement which provides instruction of a given type or types. (IIR)

Instructional Personnel. Those who render direct and personal teaching services. Included are teachers (including teachers of the homebound), teaching assistants, teacher aides, secretaries for teachers, special graders, substitute teachers, and clerks serving teachers only. Attendance personnel, health personnel, and other clerical personnel should not be included as instructional personnel. (IIR)

J

Junior College. A postsecondary institution which offers the first 2 years of college instruction, frequently confers an associate degree, and does not confer a bachelor's degree. The term "junior college" is often used interchangeably with the term "community college." See also *Community/Junior College.* (IIR)

Junior High School. A separately organized and administered secondary school intermediate between the elementary and senior high schools. See *Middle School.* (IIR)

Junior-Senior High School. A secondary school organized on a junior-senior basis and administered under one head as one unit. (IIR)

K

Kindergarten. A group or class that is organized to provide educational experiences for children for the year immediately preceding the first grade. A kindergarten class may be organized as a grade of an elementary school or as part of a separate kindergarten school. In some LEA's these groups may be called preprimary, junior primary, or primary. (IIR)

L

Leave. Any grant of legitimate absence of the staff member from duty assignment that does not affect his or her employment status. (IV)

Liabilities. Debts or other legal obligations arising out of transactions in the past which are payable but not necessarily due. Encumbrances are not liabilities; they become liabilities when the services or materials for which the encumbrances were established have been rendered or received. (IIR)

Liability Insurance. Expenditures for insurance coverage of the LEA, or its officers, against losses resulting from judgments awarded against the system. Also recorded here are any expenditures (not judgments) made in lieu of liability insurance. (IIR)

Library Books. Books purchased for general use and not primarily for use in certain classes, grades, or other particlar student groups. They include reference sets and dictionaries, but not textbooks and periodicals. (IIR)

License. The legal document giving authorization from the State (or an agency or an organization authorized by the State) to perform certain specific services in the field of education. (Sometimes used synonymously with "certificate.") (VII)

Local Education Agency. An educational agency at the local level which exists primarily to operate schools or to contract for educational services. Normally, taxes may be levied by such publicly operated agencies for school purposes. These agencies may or may not be coterminous with county, city, or town boundaries. This term is used synonymously with the terms "school district," "school system," and "local basic administrative unit." (IIR)

Location. The address of the operational unit within the LEA to which an expenditure is to be charged.

M

Machine Data Processing. The use of machines and devices in the storing of individual items of information in a form by which they may be retrieved rapidly and accurately, processed, and reproduced as single-line items, as lists of items, or in desired combinations with other items. (IIR)

Machinery. Movable equipment items (other than vehicles) composed of complex combinations of parts which transmit and modify force and motion so as to perform some desired kind of work. (IIIM)

Maintenance Personnel. Personnel on the school payroll who are primarily engaged in the repair and upkeep of grounds, buildings, and equipment. (IIR)

Major. A concentration of semester hours of college credit representing major specialization in a field of study. The number of college credits constituting a major is usually specified in State certification requirements. (VII)

Master's Degree. A graduate degree granted upon the completion of graduate work, usually the work of one year beyond the bachelor's degree. (IV)

Measure. A standard unit for determining extent or dimension to which reference may be made for purposes of description, comparison, and evaluation. Many measures are obtained by computation involving one or more items of information. (VIM)

Membership. A pupil is a member of a class or school from the first day on the current roll until the last official day of attendance. The date of permanent withdrawal should be the date on which it is officially known that the pupil has left school, and not necessarily the first day after the date of last attendance. Membership is obtained by adding the total original entries and the total reentries and subtracting the total withdrawals; it may also be obtained by adding the total number present and the total number absent. This term is also known as the "number belonging." (VM)

Membership, Aggregate Days. See *Aggregate Days Membership.*

Membership, Average Daily. See *Average Daily Membership.*

Memorandum Accounting. An informal record of an LEA transaction that cannot be recorded under the regular financial accounts but for which a record is desired. (IIR)

Middle/Junior High School. A school organization between an elementary school and a high school. This term is usually used for budget purposes when middle and junior high schools need to be grouped for planning. Any other type organization by any other name, falling between the elementary and high schools, should be included. (IIR)

Middle School. A separately organized and administered school usually beginning with grades 5 or 6 or their equivalent and including at least three grades or 3 years. Most middle schools presume, in ultimate plan if not in present reality, a 4-year high school for the grades or years which follow, as in a 4-4-4 or 5-3-4 plan. (VI)

Migrant Education. A program of instruction and services for those children who move periodically with their families from one school district to another in order that a parent or other member of the immediate family may secure seasonal employment. (VII)

Minor. A concentration of semester hours or quarter hours of college credit representing specialization (but not major specialization) in a field of study. The number of college credits constituting a minor is usually specified in State certification requirements. (VII)

Model. A representation made to be copied, followed, or imitated because of its feasibility, excellence, or worth. (VII)

N

Noncredit Course. A course for which pupils do not receive credit applicable toward graduation or completion of a program of studies. (VI)

Non-English Speaking. A term referring to pupils who do not speak English or who do not hear English spoken in their residence. (VI)

Nongraded School. See *Ungraded School.*

Nonpublic Junior College. An independent or church-related junior college not supported by public funds. (IIR)

Nonpublic School. A school established by an individual, institution, or agency other than the State, subdivisions of the State, or the Federal Government, which usually is supported primarily by other-than-public funds, and the operation of whose program rests with other-than-publicly elected or appointed officials. (IIR)

Nonresident Student. A student whose legal residence is outside the geographic area served by a specified school, LEA, or institution. (VR)

Nursery School. A separately organized and administered elementary school for groups of children during the year or years preceding kindergarten, which provides education experiences under the direction of professionally qualified teachers. (IIR)

O

Object. The commodity or service obtained from a specific expenditure. (VII)

Official. The elected or appointed member of a board of education or governing body of an LEA.

Operational Unit. A separately budgeted subdivision of an LEA established to carry out a major objective or group of objectives, such as a school, a transportation unit, or an athletic department. (IIR)

Overhead Costs. Those elements of cost necessary in the production of an article or the performance of a service which are of such a nature that the amount applicable to the product or service cannot be determined accurately or readily. Usually they relate to those objects of expenditures which do not become an integral part of the finished product or service, such as rent, heat, light, supplies, management, supervision, and other similar items. (IIR)

P

Part-Time Personnel. Personnel who occupy positions which require less than full-time service. This includes those employed full time for part of the school year, part time for all of the school year, and part time for part of the school year. See also *Part-Time Staff Member.* (IIR)

Part-Time Pupil. A pupil who is carrying less than a full course load as determined by the State or the LEA. (VR)

Part-Time Staff Member. A staff member whose total current assignments require less than his or her full-time services. A part-time staff member may be employed full time for part of the year or part time for part or all of the year. (VII)

Pension System. A free retirement plan whereby persons leaving service in the educational system because of age, disability, or length of service receive payments from funds to which they have not contrib-

uted. Payments may be either in a lump sum or in the form of annuity. See also *Retirement Fund System.* (IIR)

Personnel. Employees of an LEA or any persons under the supervision of the LEA who are eligible for workmen's compensation, the Federal Insurance Contribution Act, or wage or salary tax withholdings. Included are persons who volunteer their services.

Personnel, Administrative. See *Administrative Personnel.*

Personnel, Clerical. See *Clerical Personnel.*

Personnel, Full-Time. See *Full-Time Staff Member.*

Personnel, Guidance. See *Guidance Personnel.*

Personnel, Health. See *Health Personnel.*

Personnel, Instructional. See *Instructional Personnel.*

Personnel, Maintenance. See *Maintenance Personnel.*

Personnel, Part-Time. See *Part-Time Staff Member.*

Planning. The selection or identification of the overall, long-range goals, priorities, and objectives of the organization, and the formulation of various courses of action to be followed in working toward achieving those goals, priorities, and objectives. (IIR)

Planning-Programing-Budgeting-Evaluation System (PPBES). A structured procedure for determining policy in the allocation of resources for accomplishment of priority programs. It emphasizes long-range planning, analytic evaluative tools, and economic rationality in the setting of goals and objectives and in the determination of programs. (IIR)

Preprimary School. A separately organized and administered elementary school for pupils in the year or years preceding grade 1. This may include pupils in the prekindergarten and kindergarten years or grades. (VI)

Primary School. A separately organized and administered elementary school for pupils at the primary level, usually including grade 1 through grade 3 or the equivalent, and sometimes including preprimary years. (VI)

Private School or Nonpublic School. A school established by an agency other than the State or its subdivisions, which is primarily supported by other-than-public funds, and the operation of whose program rests with other-than-publicly elected or appointed officials. (IIR)

Professional. A term denoting a level of knowledge and skills possessed by an individual or required of an individual to perform an assignment. This level of skill is attained through extensive education and training, usually including, at a minimum, the attainment of a baccalaureate degree (or its equivalent obtained through special study and/or experience). (VIIM)

Professional and Technical Services. Services of individuals having extensive training in a particular line of work. This includes such services as those provided by architects, auditors, dentists and doctors, consultants, lawyers, tax collectors, data-processing service bureaus, and others. (IIR)

Program. A plan of activities and procedures designed to accomplish a predetermined objective or set of allied objectives. (IIR)

Programing. Preparation of a logical sequence of operations to be performed by a computer in solving a problem or processing data. This term also denotes the preparation of coded instructions and data for such a sequence. (IIR)

Prorating. The allocation of parts of a single expenditure to two or more different accounts. The allocation is made in proportion to the benefits which the expenditure provides for the respective purposes or programs for which the accounts were established. (IIR)

Public Grant. A contribution, in the form of either money or material goods, made by one governmental unit to another unit for which the contributing unit expects no repayment. Grants may be for specific or general purposes. (IIR)

Public Information. Information for public consumption through news media about the condition and progress of education in the LEA. It includes news releases, speeches to civic groups or other assemblies, and appearances on local radio and television programs. (IIRM)

Public Library. A library operated by publicly elected or appointed officials and open to the public. When the

library is supported wholly or partially by a public school the expense is charged to "Community Services." (IIR)

Public Relations. See *Community Relations.*

Public School. A school supported primarily by public funds and operated by publicly elected or appointed school officials, in which the program and activities are under the control of these officials. (IIR)

Pupil. An individual for whom instruction is provided in an educational program under jurisdiction of a school, school system, or other educational institution. No distinction is made between the terms "student" and "pupil"; both terms include individuals at all instructional levels. The pupil may receive his instruction in a school facility or in another location such as his house or a hospital. Instruction may be provided by direct teacher contact or by some other approved means such as television, radio, telephone, or correspondence. (VR)

Pupil Accounting. A system for collecting, computing, and reporting information about pupils. (VR)

Pupil Activity Fund. Financial transactions related to school-sponsored pupil activities and interscholastic activities. These activities are supported in whole or in part by income from pupils, gate receipts, and other fund-raising activities. Support may be provided by local taxation. (IIR)

Pupil-Staff Member Ratio. See *Staff Member-Pupil Ratio.*

Q

Quarter Credit Hour. A unit of measure, frequently used in higher education, denoting class meetings for 1 hour a week for an academic quarter (generally about 12 weeks). A student satisfactorily completing a course scheduled for three class sessions (or the equivalent) per week in an academic quarter earns three quarter credit hours. (VIIM)

R

Record Management. The establishment and maintenance of an adequate and efficient system for controlling the records of an LEA. (IIR)

Records. A collection of infromation which is prepared by a person, unit, or organization for the use of that person, unit, or organization. (VII)

Recruitment and Placement. The process involved in employing and assigning personnel for the LEA. (IIR)

Regular Class. The general type of class in which most pupils receive instruction, including most classes other than those which are composed of exceptional pupils. (VI)

Regular Salaries. Full-time, part-time, and prorated portions of the gross salary costs for work performed by employees of the LEA who are considered to be in positions of a permanent nature. (IIR)

Reports. A collection of information which is prepared by a person, unit, or organization for the use of some other person, unit, or organization. (IIR)

Research. Systematic study and investigation in some field of knowledge, undertaken to establish facts or principles. (VII)

Resident Student. A student whose legal residence is within the geographical area served by a specified school, LEA, or institution. (VR)

Retirement Fund System. A plan whereby a fund of money, built up through contributions from participants and other sources, is used to make regular payments to those who retire from service in the educational system by reason of age, disability, or length of service. See also *Pension System.* (IIR)

Revenues. Additions to assets which do not increase any liability, do not represent the recovery of an expenditure, do not represent the cancellation of certain liabilities without a corresponding increase in other liabilities or a decrease in assets, and do not represent contributions of fund capital in food service and pupil activity funds. (IIR)

S

Salary. The total amount regularly paid or stipulated to be paid to an individual, before deductions, for personal services rendered while on the payroll of the LEA. Payments for sabbatical leave are also considered as salary. (IIR)

School. A division of the LEA consisting of a group of pupils composed of one or more grade groups, organized as one unit with one or more teachers to give instruction of a defined type, and housed in a school plant of one or more buildings. More than one school may be housed in one school plant, as is the case when the elementary and secondary programs are housed in the same school plant. (VII)

School Administration. Those activities involved in the overall administrative management of a single school or a group of schools. (IIRM)

School Bus. A vehicle used for transporting students, with a manufacturer's rated seating capacity of 12 or more with at least 13 inches of seat space per pupil). (IIIM)

School Census. An enumeration and collection of data, as prescribed by law, to determine the name, age, address, and other pertinent information about children and youth who reside within the geographical boundaries of an LEA. (VIIM)

School Day. That part of a calendar day when school is in session. (V)

School District. See *School System.*

School, Elementary. See *Elementary School.*

School, Junior High. See *Junior High School.*

School, Middle/Junior High. See *Middle/Junior High School.*

School Plant. The site, buildings, and equipment constituting the physical facilities used by a single school or by two or more schools sharing the use of common facilities. (III)

School Plant, Combined Elementary and Secondary. A school plant which houses both an elementary school and a secondary school. (III)

School, Private or Nonpublic. See *Private School.*

School, Public. See *Public School.*

School, Secondary. See *Secondary School.*

School, Senior High. See *Senior High School.*

School Site. The land and all improvements to the site, other than structures, such as grading, drainage, drives, parking areas, walks, plantings, play courts, and playfields. (III)

School, Summer. See *Summer School.*

School System. All the schools and supporting services operated by the board of education, a specified administrative unit, or any other organization which operates one or more schools. See also *Local Education Agency.* (IIR)

School Term. A prescribed span of time when school is open and the pupils are under the guidance and direction of teachers. See *Term.* (VII)

School, Vocational or Trade High. See *Vocational or Trade High School.*

School Year. The 12-month period denoting the beginning and ending dates for school accounting purposes, usually from July 1 through June 30. (VI)

Secondary School. A school comprising any span of grades beginning with the next grade following an elementary or middle school and ending with or below grade 12. (VI)

Semester. Half of a regular school term, usually 16 to 18 weeks in duration. (VR)

Semester Credit Hour. A unit of measure, frequently used in higher education, denoting class meetings for 1 hour a week for an academic semester (generally about 18 weeks). A student satisfactorily completing a course scheduled for three class sessions (or the equivalent) per week in an academic semester earns three semester credit hours. (VIIM)

Senior High School. A secondary school which offers the final years of high school work necessary for graduation and which is invariably preceded by a junior high school. (VI)

Service. Those activities which provide some support or benefit to another person, agency, or institution. (VII)

Service Area. A division of an LEA's operation consisting of activities which, regardless of their nature, have the same general operational objective. It is the third level of "function."

Service Area Direction. The direction and management of the service area of any function. It includes activities of all those engaged in managing and directing a given area. (IIR)

Shared Revenue. Revenue which is levied by one governmental unit but shared, usually in proportion to the amount collected, with another unit of government or class of governments. (IIR)

Single School. Activities which extend or apply to only a single attendance area in contrast to systemwide.

Social Work. Activities concerned with the prevention of, or solution to, those personal, social, and emotional problems of individuals which involve such relationships as those of the family, school, and community. (IIR)

Source of Funds. The agency, governmental or otherwise, which appropriates money used by a local school or LEA. (IIR)

Special Cost Center. A dimension for accumulating additional details on costs of a segment of an existing cost center or for accumulating costs of a temporary program or project for evaluative purposes. See also *Cost Center.* (IIR)

Special Education. Direct instructional activities designed primarily to deal with students who are (1) physically handicapped, (2) emotionally disturbed, (3) culturally different (or who need compensatory education), (4) mentally retarded, and (5) mentally gifted and talented. It may involve preprimary, elementary, secondary, postsecondary, or adult/continuing education. (IIR)

Staff Accounting. Services rendered in connection with the systematic recording, filing, and storing of information related to staff members employed by the LEA. (IIR)

Staff Member. A person whose relationship with the LEA meets the following criteria:

- Performs activities or provides services for the LEA, under the direction or control of the agency's governing authority, for compensation or on a volunteer basis.
- Is considered as an employee for the purpose of workmen's compensation, the Federal Insrance Contribution Act, and wage or salary tax withholdings. (VIIM)

Staff Member, Full-Time. See *Full-Time Staff Member.*

Staff Member, Part-Time. See *Part-Time Staff Member.*

Staff Retention Rate. The rate, expressed as a percentage, at which employees of an LEA remain employed from one period of time to the next, such as from year to year. (IVM)

Staff Separation Rate. The rate, expressed as a percentage, at which employees leave the employment of an LEA during a period of time, usually a year. (IVM)

Staff Member-Pupil Ratio. A fraction attained by dividing the number of pupils in membership by the number representing the full-time equivalency of staff members involved in any particular activity or group of activities as of a particular date. (See chapter 6 for more details regarding the staff-pupil measure.)

Staff Services. The activities concerned with recruiting, accounting, placing, transfering, and training staff employed by an LEA. (IIR)

Standard Terminology. Items of information (terms), understood, accepted, and used nationwide, which can be combined, compared, and related to other terms and which are discrete in classification and definition. (VIIM)

State Aid for Education. Any grant made by a State government for the support of education. See also *Public Grant.* (IIR)

State Board of Education. The legally constituted body having the major responsibility for the general supervision of elementary and secondary education in the State. This board may also have total or partial responsibility for the supervision of higher education. (VII)

State Department of Education. An organization, composed of the chief executive officer (chief State school officer) and staff, that exists to conduct the work delegated to it by law. (VII)

State Education Agency. The organization established by law for the primary purpose of carrying out at least a part of the educational responsibilities of the State. It is characterized by having statewide jurisdiction and may be composed of a State board, chief executive officer, and staff. Some State education agencies may lack one or two of these three elements, but in any case there must be either a board or a chief executive officer. The term "commission" is sometimes used synonymously with "board." (VII)

State-Operated. A term applying to any program, school, or other institution operated by a State agency. (VII)

Statistical Services. Services concerned with collecting, organizing, summarizing, analyzing, and disseminating educational data pertinent to various educational interests, including pupils, staff, instruction, facilities, and finance. (IIR)

Student. See *Pupil.*

Student-Body Activities. Direct and personal services for public school pupils, such as interscholastic athletics, entertainment, publications, clubs, band, and orchestra, that are managed or operated generally by the student body under the guidance and direction of adults or a staff member, and which are not part of the regular instructional program. See *Cocurricular Activities.* (VIM)

Student Teaching. Teaching performed under the supervision of a certificated teacher as part of a formalized higher education program of teacher preparation.

Subfunction. A major division of an LEA's operation consisting of activities which, regardless of their nature, have the same general operational objective. It is the second level of "function."

Subject. An organizaed body of knowledge which is more comprehensive than a course but less comprehensive than a subject-matter area. (VI)

Subject Matter. A body of facts, understanding, processes, skills, values, and appreciation related to a specific aspect of human activity and experience. Subject matter includes the accumulated knowledge, skills, appreciations, and attitudes comprising the substance of any subject-matter area. (VI)

Subject-Matter Area. A grouping of related subjects or units of subject matter under a heading such as English, (language arts), foreign languages, art, music, natural sciences, industrial arts, home economics, or agriculture. (VI)

Summer School. The name usually applied to the school session carried on during the period between the end of the regular school term and the beginning of the next regular school term. (IIR)

Summer Term—Day. A division of the school year which usually begins in June and ends in August, during which pupils attend day sessions. (IIR)

Summer Term—Evening. A division of the school year which usually begins in June and ends in August, during which pupils attend evening sessions. (IIR)

Supervisors of Instruction. Staff members who have specialized knowledge and skills in the area of curriculum and instruction and who provide infromation and guidance to other staff members to improve instruction.

Supply. A material item of an expendable nature that is consumed, worn out, deteriorated in use, or that loses its identity through fabrication or incorporation into a different or more complex unit or substance. (VII)

Support Services. Activities which provide administrative, technical, and logistical support to a program. "Support services" exist to sustain and enhance the fulfillment of the objectives of other major functions. (IIR)

Systems Analysis. Activities involving the search for an evaluation of alternatives which are relevant to defined objectives, based on judgment, and wherever possible, on quantitative methods. The term also applies to the development of data processing procedures or their application to electronic data processing equipment. (VIIM)

Systemwide. Extending or applying to all of the schools in an LEA or to all of the schools where the activities apply. (IIR)

T

Tax Assessment and Collection. Activities concerned with assigning and recording equitable values to real and personal property, assigning a millage rate (dollars

yield per thousand dollars), and receiving yield in a central office. (IIR)

Teacher. A person who instructs students. (IIR)

Teacher Aide. A person who assists a teacher with routine activities associated with teaching and with those activities requiring minor decisions regarding students, such as monitoring, conducting rote exercises, operating equipment, and clerking. (IIRM)

Teaching Assistant. A person who performs the day-to-day activities of teaching students under the supervision of a teacher. The teaching assistant does not make any diagnostic or long-range evaluative decisions regarding students taught. The person may or may not be certificated but has completed at least 2 years of formal education preparatory for teaching or the equivalent in experience or training.

Teaching Intern. A person who instructs students without having fulfilled all the requirements for a professional in the teaching field. This person usually has a professional level of competence in a field other than education and is allowed to teach while obtaining the necessary knowledge and skills in education and/or educational psychology.

Technical. A term denoting a level of knowledge and skill possessed by an individual or required of an individual to perform an assignment. The level of skill is attained through education and training usually including, at a minimum, the attainment of an associate degree (or its equivalent obtained through special study and/or experience).

Technical Staff Member. A staff member who possesses the knowledge and skills of a technician (technical level competencies) and performs activites for the LEA which require this level of expertise for satisfactory completion.

Technical Education. That body of knowledge organized in a planned sequence of classroom and laboratory experiences, usually at the post-secondary level, designed to prepare pupils for a cluster of job opportunities in a specialized field of technology. The program of instruction normally includes the study of the underlying sciences and supporting mathematics inherent in a technology, as well as the methods, skills, materials, and processes used and the services performed. Technical education prepares the student for the occupational area between the skilled crafts and the professions. (VIM)

Temporary Salaries. Full-time, part-time, and prorated portions of the gross wages for work by employees of the LEA who are hired on a temporary or substitute basis to perform work in positions of either temporary or permanent nature. (IIRM)

Term. A prescribed span of time when school is open and the pupils are under the guidance and direction of teachers. (IIR)

Textbooks. Books obtained primarily for use in certain classes, grades, or other particular student groups rather than for general school use. (VII)

Transfer Pupil. A pupil who severs his connection with a class, grade, or school in order to transfer to another class, grade, or school. This includes pupils who transfer or are promoted from an elementary school to a secondary school or from a junior high school to a senior school. (VR)

Travel Expenses. Costs for transportation, meals, hotel, and other expenses associated with traveling on business for the LEA. Payments for *per diem* in lieu of reimbursements for subsistence (room and board) also are included. (IIRM)

Tuition. Money charged by an LEA or educational institution for a period of time, not including special charges as for books and laboratory fees. (IIR)

Tuition Student. A pupil for whom tuition is paid. (IIR)

Two-Year Branch College. A division of an institution of higher education which offers the first 2 years of college instruction and which is located in a community different from that of its parent institution and beyond a reasonable commuting distance from the main campus of the parent institution. (VI)

Two-Year Technical Institute. An institution offering instruction primarily in one or more of the technologies at the postsecondary instructional level. (VI)

U

Unit Cost. Expenditures for a function, activity, or

service divided by the total number of units for which the function, activity, or service was provided. (IIIM)

Unit of Measure. A combination of statistical elements in education usually expressed in ratios, such as pupils per teacher, square feet per pupil, cost per pupil, cost effectiveness ratio.

Ungraded School. A school which has no grade designations or grade level standards. In such a school pupils are reclassifed frequently according to individual progress. Aspects of subject matter taught are designed for the various abilities of individual pupils. Frequently, provision is made for independent study and research by pupils as well as for permissive self-selection of problems and materials. Achievement standards vary with the rate of learning for different pupils and pupil advancement can occur at any time. (VR)

Unit of Instruction. A major subdivision of instruction within a course or within an aspect of subject-matter content provided for a group of pupils such as a self-contained class. Generally composed of several topics, a unit of instruction includes content and learning experiences developed around a central focus, such as a limited scope of subject matter, a central problem, one or more related concepts, one or more related skills, or a combination of these. (VR)

V

Vehicles. A conveyance used to transport persons or objects. (IIIM)

Visiting Teacher (Home-School Counselor). A person who visits pupils and parents in the home, assisting the school and the home in solving the personal adjustment problems of pupils. See *Social Work.* (IVM)

Vocational or Trade High School. A secondary school which is separately organized under an administrator (such as a principal) for the purpose of offering training in one or more skilled or semiskilled trades or occupations. Such a school may or may not receive Federal aid. Departments of other types of high schools which offer commercial, agricultural, home economics, industrial arts, and other applied art courses would not be considered as separately organized vocational high schools. (II)

Vocational and/or Technical School. A school which is separately organized under the direction and management of an administrator (such as a principal) for the primary purpose of offering education and training in one or more semiskilled, skilled, or technical occupations. (VIM)

Volunteered Services. Services provided an LEA without compensation to the provider.

Voucher. A document which authorizes the payment of money and usually indicates the accounts to be charged. (II)

Voucher System. A system which calls for the preparation of vouchers for transactions involving payments and for the recording of such vouchers in a special book or original entry, known as a voucher register, in the order in which payment is approved. (II)

W

Welfare Activities. Activities of providing for personal needs of indigent persons and for services in connection with disaster relief. (IIRM)

Withholding. The process of deducting from a salary or wage payment an amount, specified by law or regulation, representing the estimated Federal or State income tax of the individual that the employer pays to the taxing authority. (IIR)

Withholding Taxes. See *Withholding.*

Work Order. A written order authorizing and directing the performance of a certain task, issued to the person who is to direct the work. Among the types of information shown on the order are the nature and location of the job, specifications of the work to be performed, and a job number which is referred to in reporting the amount of labor, materials, and equipment used. (IIRM)

Work-Study Program. A school program designed to provide employment for students who could not continue in school without the financial support provided through a job. The employment may or may not be curriculum-related. (*Cooperative programs* provide work experiences specifically related to the student's instructional program. The student's on-the-job training is an integral part of his total school curriculum.) (VII)

Appendix D

AFTERWORD

This handbook has been developed through a cooperative process. The U.S. Office of Education, through a contract with a management consultant and accounting firm, has consulted with Federal, State, and local education managers and representatives of the educational community throughout the Nation in producing a staff handbook which will assist program managers in making day-to-day and long-range decisions. The first stage of preparation consisted of researching the literature on staff manuals and interviewing personnel in the Office of Education and other Federal agencies regarding information and data elements needed in making decisions about staff members.

Preliminary information and data elements were taken for review and counsel to State and local education managers and officials in conferences in several States. Conferences were held in State education agency offices with certification, accreditation, and systems officers, and with invited LEA superintendents and personnel administrators. LEA conferences were held with personnel administrators, systems managers, and school administrators. In each setting, the data elements in existence in each agency and those derived from preliminary research efforts were analyzed.

A more detailed analysis followed to review the results of these conferences in terms of a possible structure to meet the needs expressed without developing a specific data subsystem. This was in keeping with the objective of categorizing data elements for system building without specifically designating a system. Special emphasis was given to linkages to the other OE handbooks and their related subsystems.

A National Review Committee was created, composed of members designated by the executive secretaries of 12 national associations, listed in appendix E, to represent their respective groups. (The associations had been chosen by the Office of Education to represent various segments of the educational community.) The first meeting was held on December 14, 1971 to review the purposes, philosophies, and structure of the handbook and to make recommendations for improvement. The basic structure, the general concept, and the proposed outline of the new handbook were approved at that meeting.

After changes and revisions were made, a substantially complete first draft was submitted to this same committee on March 22-23, 1972. During this meeting, the draft was reviewed page by page for any suggestions and improvements to the manual that the members might want to make by changing, adding, or deleting. A second draft was the result of this National Review Committee meeting.

The next step in the development of the handbook was a series of two-day conferences held in May and June 1972 in the 10 U.S. Department of Health, Education, and Welfare regions. The conferees selected to attend consisted of members of the 12 organizations which participated in the earlier stages of the handbook's revision. Each organization selected a delegate from each State. The National Review Committee members were also invited.

The regional conferences were conducted in Kansas City, Denver, San Francisco, Seattle, New York, Boston, Chicago, Philadelphia, Dallas, and Atlanta, in this order. The

third draft of the handbook resulted from the suggestions and changes made at these regional meetings. A third meeting of the National Review Committee was held on September 27-28, 1972, to review carefully all details of the third draft of the handbook.

Based upon this meeting of the National Review Committee, a fourth and final draft was prepared, incorporating all agreed-upon changes and improvements. This fourth draft, approved by the project monitor, was delivered to the Educational Data Standards Branch, U.S. Office of Education, in December 1972.

Appendix E

ACKNOWLEDGMENTS

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The development and acceptance of this handbook would have been much more difficult without the professional assistance of many people throughout the Nation in positions related to staff administration. Also received with gratitude was the assistance of the executive secretaries of the 12 national associations in selecting representatives of their associations for the National Review Committee and for the regional conferences. Participants of each regional conference are listed under the organizations they represented, with conferences identified by designations placed after the participants' names according to the following legend:

- Number 1 through 10 in parentheses designate which regional conference was attended; and
- NRC in parentheses designates the National Review Committee.

The conferences are numbered as follows:

(1) Boston, Massachusetts
(2) New York, New York
(3) Philadelphia, Pennsylvania
(4) Atlanta, Georgia
(5) Chicago, Illinois
(6) Dallas, Texas
(7) Kansas City, Missouri
(8) Denver, Colorado
(9) San Francisco, California
(10) Seattle, Washington

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